Using Discoverer 4i Web

Student Guide

Table of Contents

Using Discoverer 4i Web

Section Objectives

At the end of this section, you should be able to:

- Access Discoverer

- Open Existing Workbooks and Create New Workbooks

- Save Workbooks to the Database

- Edit, Rename, Delete or Export a Workbook

- Create and Export a Graph

- Create Conditions, Totals, Percentages, Calculations and Parameters for a Workbook or Worksheet

- Understanding Discoverer Administrator Functions

Using Discoverer 4i Web

Overview

Discoverer 4i Web is an Oracle based tool used for the creation of user specific reports called Workbooks. You cannot have a worksheet without a workbook. You cannot save a workbook that contains no worksheets. This tool allows the user to edit and modify reports at will. Users have the flexibility of making changes immediately without submitting a system change request for static or seeded system report.

Some Discoverer reports can be converted into an HTML or web reports environment making them a static report.

Discoverer reports that have been created by one organization can be shared to multiple organizations through the help of the Discoverer Administrator.

Business Area

The Discoverer tool is based on the concept of utilizing Business Areas for data retrieval. A business area is a set of related information with a common business purpose. For example, information about all products may be stored in one business area, while information about customers and employees is stored in another business area. Business areas make data retrieval easier because a user does not have to understand where data resides, such as, table structures in order to gain the information needed. Business areas are available in English descriptive formats. Within the Business areas are folders, which contain detailed information for that areas such as, Payables in a Business Area and within that area may be a folder called Supplier Number.

Folders

Folders store details about groups of related information. For example, all details about employees of an organization may be stored in one folder, while information about customers is stored in another folder. Folders map to database tables, to views or to combinations of tables and views. A folder that is based on a single table is called a simple folder. A folder that is a combination of one or more tables or vies is called a complex folder.

Items

Folders are composed of items. Items map to columns in a database table. Each item has a name and contains a specific type of information. For example, if a folder contains details about employees, the items may include the employee's name, start date, and department. When you include an item in a query, it is known as a query item. An item can also be calculated or derived.
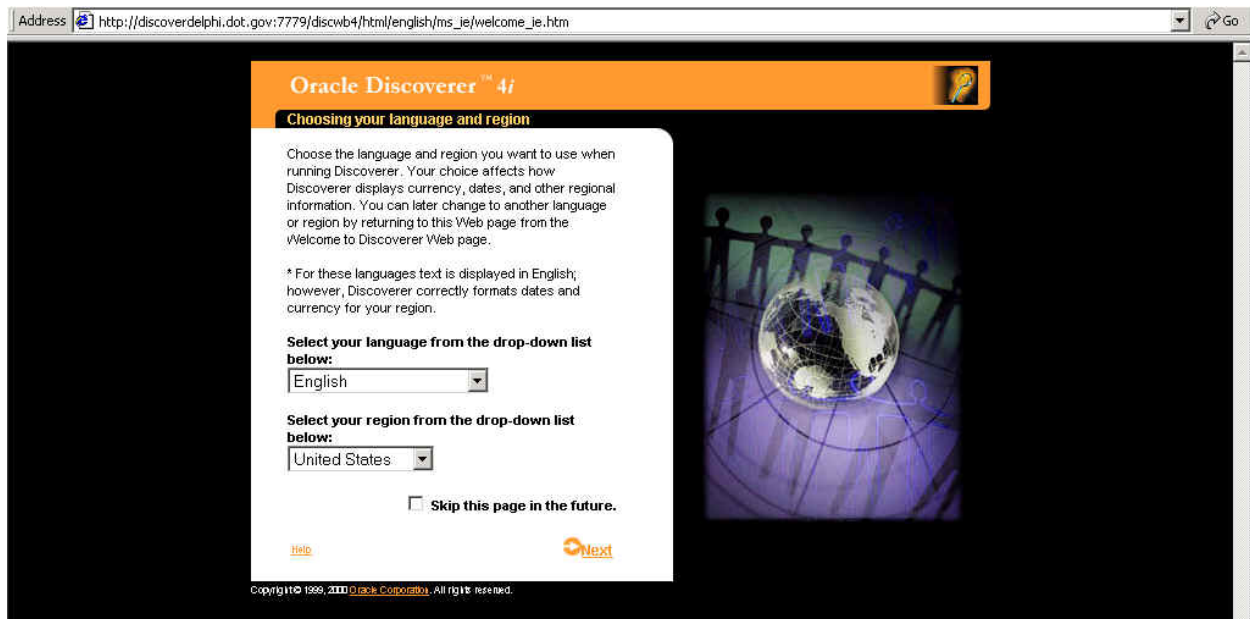
Security

Discoverer 4i Web utilizes the same level of user security that all Oracle Federal Financial Applications require. User access can be limited based on roles and responsibilities.

Accessing Discoverer 4i Web

Browser (Netscape or Internet Explorer)

http://discoverdelphi.dot.gov:7779/discwb4/html/english/welcome.htm

Accessing Discoverer

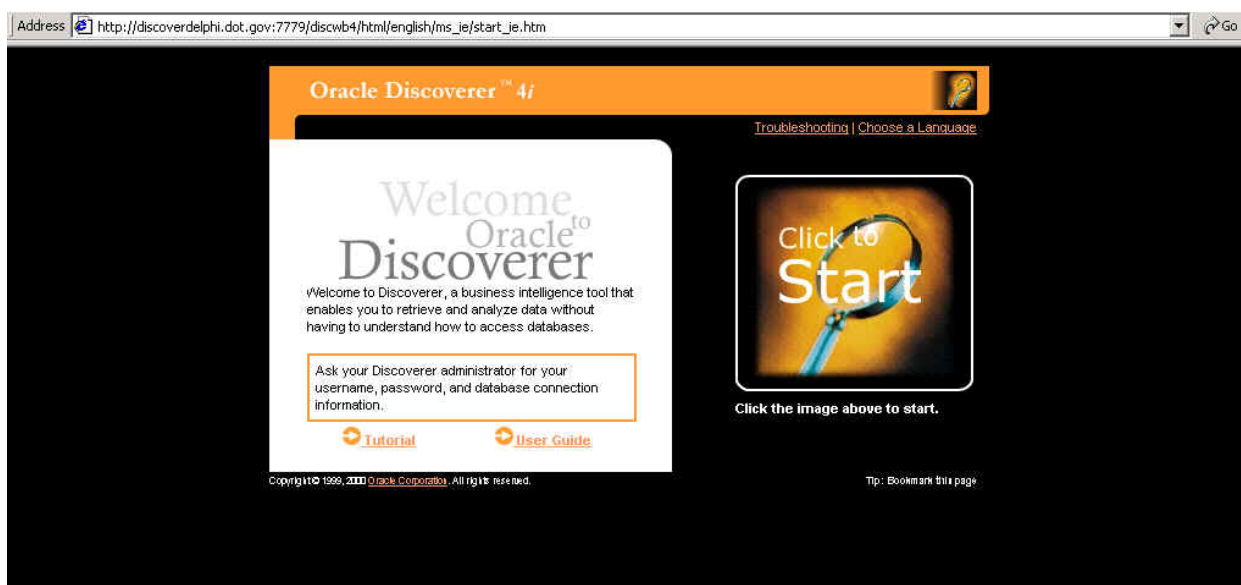1. Select the word "Next".

Browser (Netscape)

http://discoverdelphi.dot.gov:7779/diswb4/html/english/netscape/start_nn.htm

Accessing Discoverer

Browser (Internet Explorer)

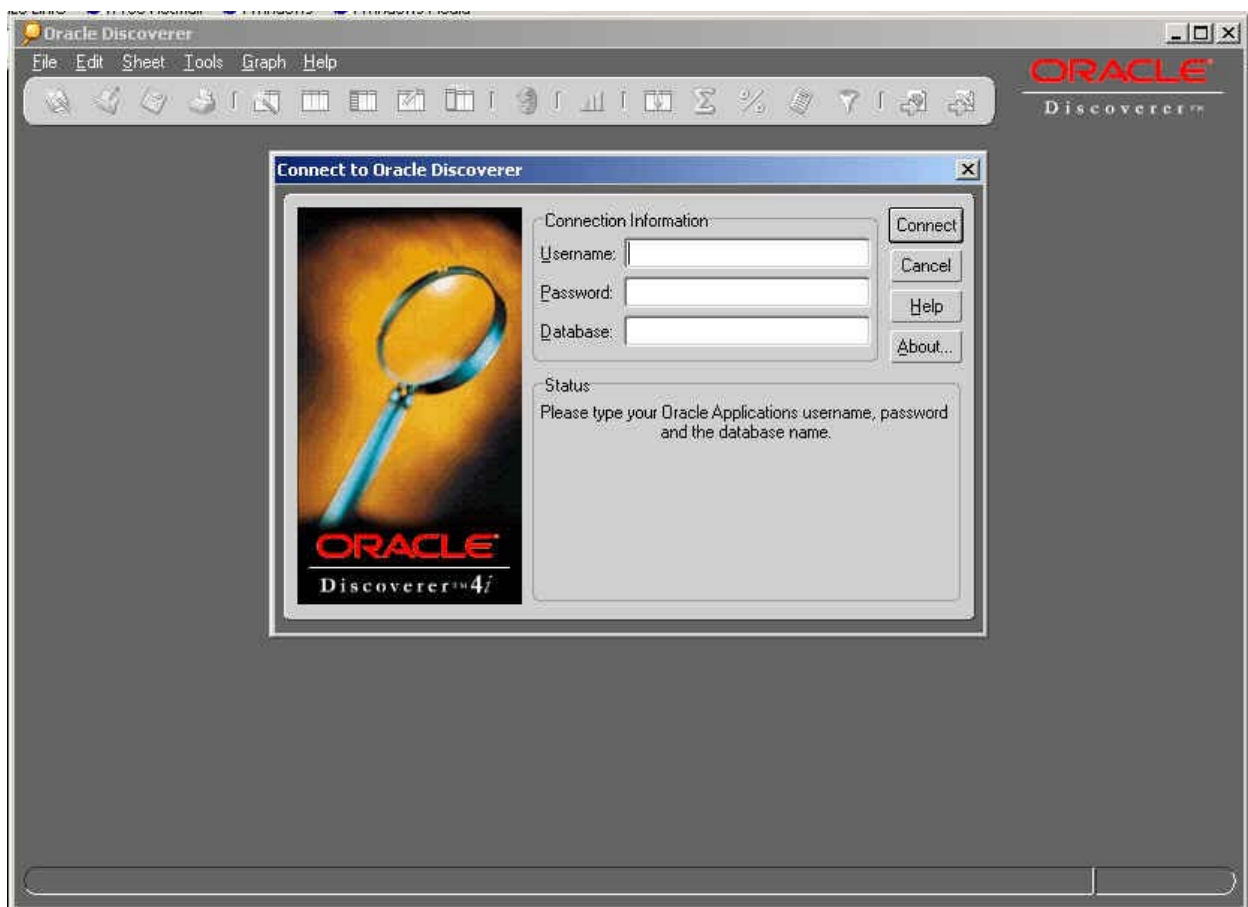http://discoverdelphi.dot.gov:7779/diswb4/html/english/ms_ie/start_ie.htm

Accessing Discoverer
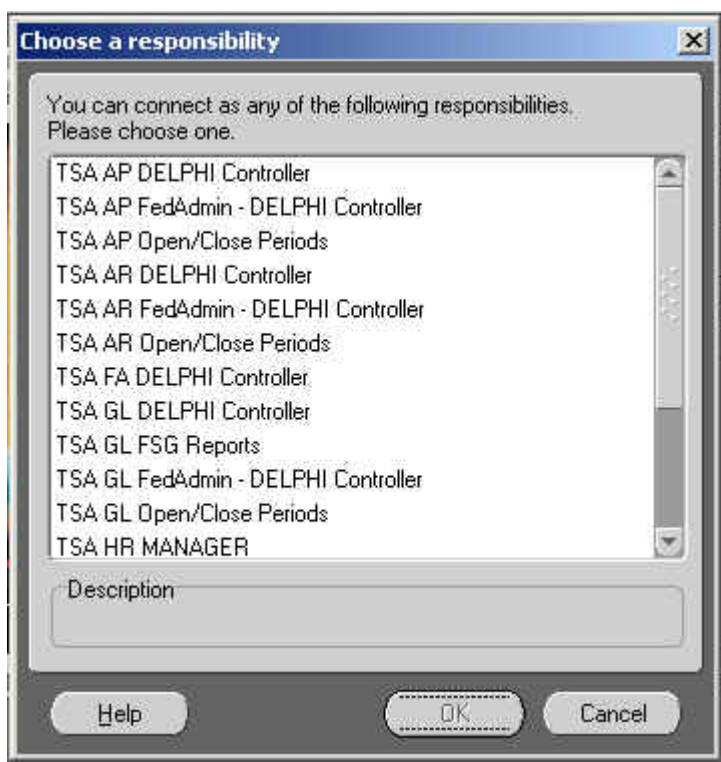
Using Discoverer 4i Web

2.   Select Start.

3.   Select Yes to accept the installation.

4. Type in your User Name. This will be the same as your production sign on.

5. Enter your password. This will be the same as your production password.

6. Enter Prod as the Database Name.

7. Select Connect.

Using Discoverer 4i Web

Choose a responsibility

You can connect as any of the following responsibilities.
Please choose one.

TSA AP DELPHI Controller
TSA AP FedAdmin - DELPHI Controller
TSA AP Open/Close Periods
TSA AR DELPHI Controller
TSA AR FedAdmin - DELPHI Controller
TSA AR Open/Close Periods
TSA FA DELPHI Controller
TSA GL DELPHI Controller
TSA GL FSG Reports
TSA GL FedAdmin - DELPHI Controller
TSA GL Open/Close Periods
TSA HR MANAGER

Description

Help   OK   Cancel

8. Select the desired Responsibility from the list of values.

Using Discoverer 4i Web

Terminology

Using Discoverer 4i Web can be made easier if terminology is understood within the product. In order to help relate the concepts to the product descriptions you can refer to a terminology document.

Discoverer 4i Web Terminology

Business Areas
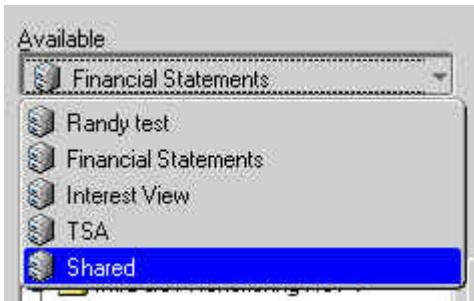
Business Areas - located in the Workbook Wizard Step 2, under the Available dropdown menu.

A business area is a set of related information with a common business purpose. For example, information about all products may be stored in one business area, while information about customers and employees is stored in another business area.

Folders

Folders - located in the Workbook Wizard Step 2, directly under the Available dropdown menu box.

Folders store details about groups of related information. For example, all details about employees of an organization may be stored in one folder, while information about customers is stored in another folder. Folders map to database tables, to views or to combinations of tables and views. A folder that is based on a single table is called a simple folder. A folder that is a combination of one or more tables or views is called a complex folder.

Items

Items - located in the Workbook Wizard Step 2 and are viewable when you execute the + sign on a folder.

Folders are composed of items. Items map to columns in a database table. Each item has a name and contains a specific type of information. For example, if a folder contains details about employees, the items may include the employee's name, start date, and department. When you include an item in a query, it is known as a query item. An item can also be calculated or derived.

Data Types

CHARACTER	Uppercase, mixed uppercase and lowercase letters, numbers, and symbols such as %.
NUMBER	Numbers, decimal point, and signs such as + and -.
DATE	Any valid date between January 1, 4712 BC and December 311, 9999 AD.

Rows

A folder or item consists of any number of rows, each of which represents all the information about one member of that folder.

Queries

A query is composed of query items and retrieves information from the database. Running a query produces a report.

Worksheets and Workbooks

A worksheet is generated when you run a query. It contains information retrieved from the database based on the items in the query.

A workbook is a collection of worksheets that can be saved in the database or on your local hard disk as a file. With Discoverer, you can produce different styles of reports.

Menu Bar

The menu bar in Discoverer 4i Web is for common tasks such as creating a new workbook, saving a file and getting help.

Using Discoverer 4i Web

Discoverer 4i Web Toolbar

1.   New Workbook Icon. Select his icon to create a new workbook.

2.   Open Icon. Select this icon top open and exit workbook.

3.   Save Icon. Select this icon to save changes made to your workbook.

4.   Print Icon. Select this icon to print your current workbook.

5.   New Workbook Icon. Select this icon to create a new worksheet in your current workbook.

6.   Duplicate as Table Icon. You can duplicate a worksheet as the same or a different output type such as a Table Layout. The duplicated worksheet appears as a new worksheet in the workbook. The Wizard tool will open in a tabbed format so that you can modify the new layout.

7.   Duplicate as Crosstab Icon. You can duplicate a worksheet as the same or a different output type such as a Crosstab Layout. The duplicated worksheet appears as a new worksheet in the workbook. The Wizard tool will open in a tabbed format so that you can modify the new layout.

8.   Edit Worksheet Icon. Select this icon to edit all aspects of the current worksheet or workbook. Items such as parameters, layout, calculations or sort options can be edited as desired.

9.   Table Layout Icon. Select this icon to make changes to a Table Layout Worksheet or Workbook.

10.   Refresh Icon. Select this icon to refresh the worksheet or workbook with any changes or edit made.

11.   Graph Wizard Icon. Select this icon to create a graph for your current worksheet or workbook. These graphs can be added to the existing worksheet or can be a stand alone

Using Discoverer 4i Web

graph. These are several graphs to choose from some being Pie Chart, Bar Chart, Horizontal chart and many others.

12. Sort Icon. Select this icon to sort your current worksheet or workbook in high to low or low to high order or by selecting a sort group.

13. Totals Icon. Select this icon to modify existing totals for your current worksheet or workbook.

14. Percentages Icon. Select this icon to modify or place percentages into your current worksheet or workbook.

15. Calculations Icon. Select this icon to modify or place calculations into your current worksheet or workbook.

16. Conditions Icon. Select this icon to add conditions to your current worksheet or workbook. You can add standard formulas or advanced formulas.

17. Export to HTML Format. Select this icon to place your workbook into an HTML or Web Format.

18. Export to Excel Format. Select this icon to place your workbook into a Microsoft Excel format for manipulation or presentation.

Using Discoverer 4i Web

Administrator Functions

Discoverer 4i Web Administrators are primary in the functions needed to setup and administer the product.

The Discoverer Administrator performs many functions including the following:

- Defining Business Areas

- Controlling User Access

- Defining Drill Paths

- Defining summary Tables

Creating the End User Layer

The Administrator creates an End User Layer (EUL) to provide a conceptual view of the database. This view helps users navigate through the data more easily when performing queries. The End User Layer contains enhanced definitions of folders and their items, as well as the relationships among the folders.

Using Discover 4i Web

Business Areas

Within the End User Layer, related folders are grouped into business areas. Users can be granted access to more than one business area and the same business area can be granted to more than one user. Also, the same object can be present in more than one business area. You can include items from a folder in your query only if you have access to the business area that contains that folder.

Identifying Your Requirements

The Success of an implementation of Discoverer depends largely on how closely the structure of the End User Layer reflects your requirements for accessing information. It is important that you provide as much information as possible to the Administrator. Information such as, common queries, meaningful names for business areas and folders, common filters and summary information needed.

Workbooks

Creating New Workbooks, Saving, Editing, Deleting and Renaming of Workbooks and Worksheets are the most used features of the Discoverer product. When creating a new workbook a user has several design options, there are Table Layout Workbooks, Crosstab Layout Workbooks, Page-Detailed Table Layout Workbooks, Page-Detailed Crosstab Layout Workbooks.
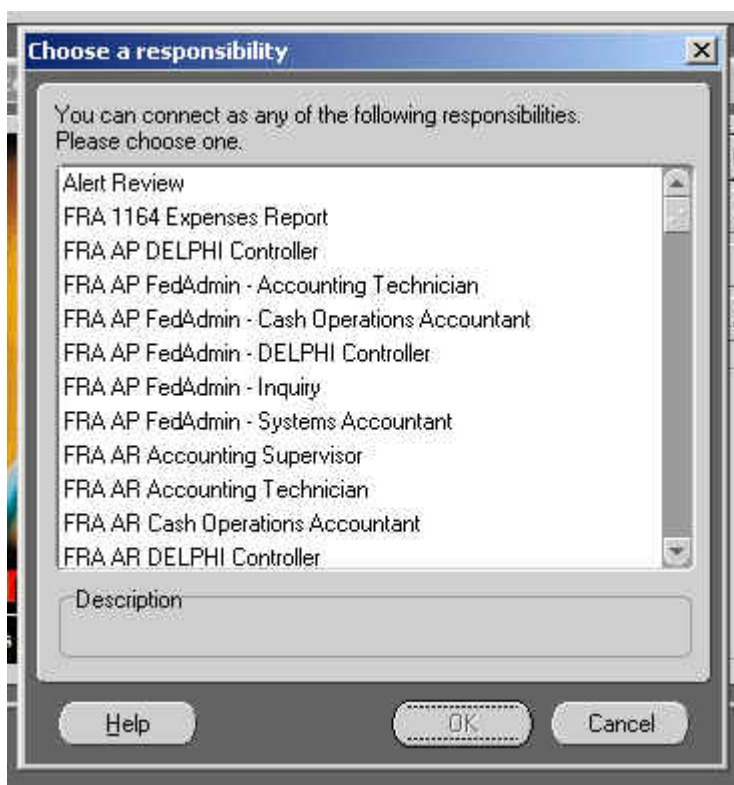
Open an Existing Workbook
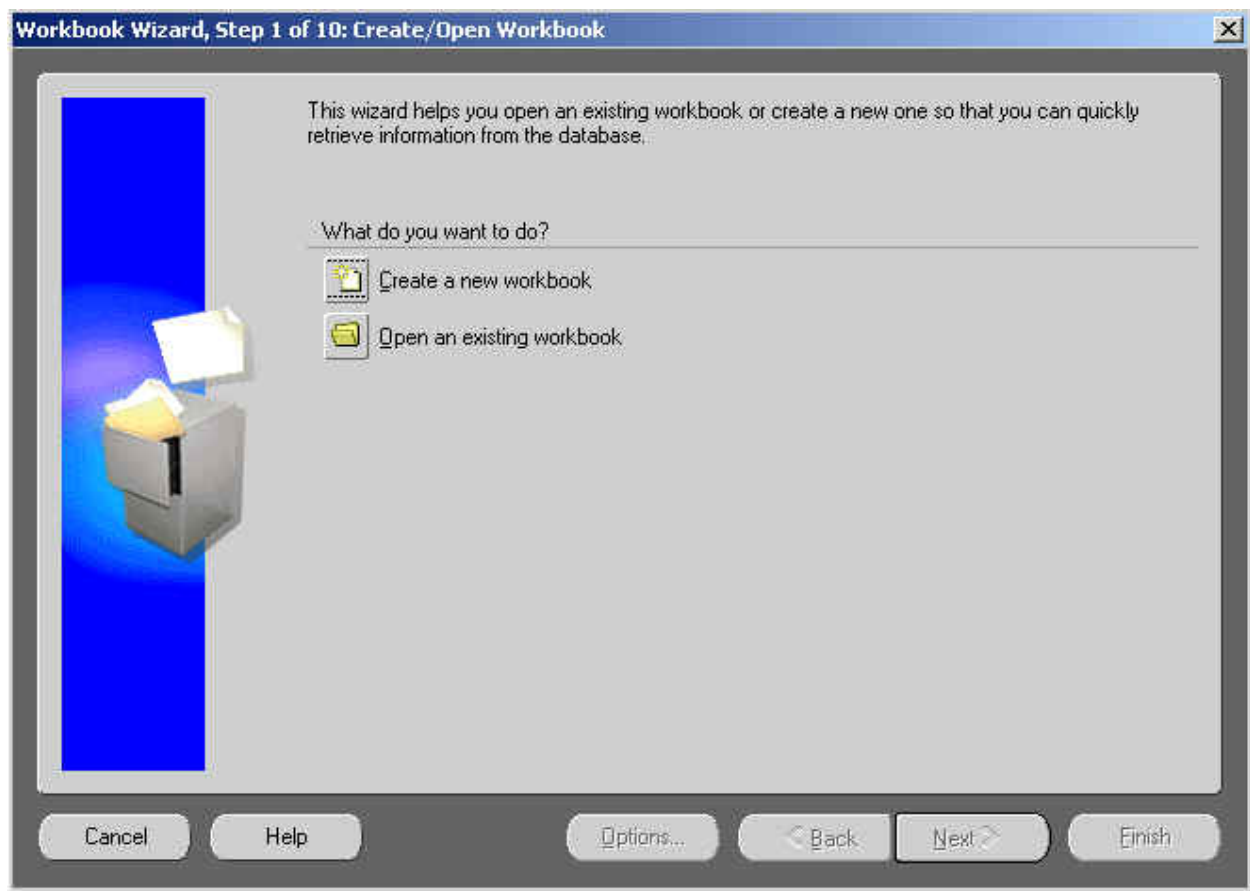
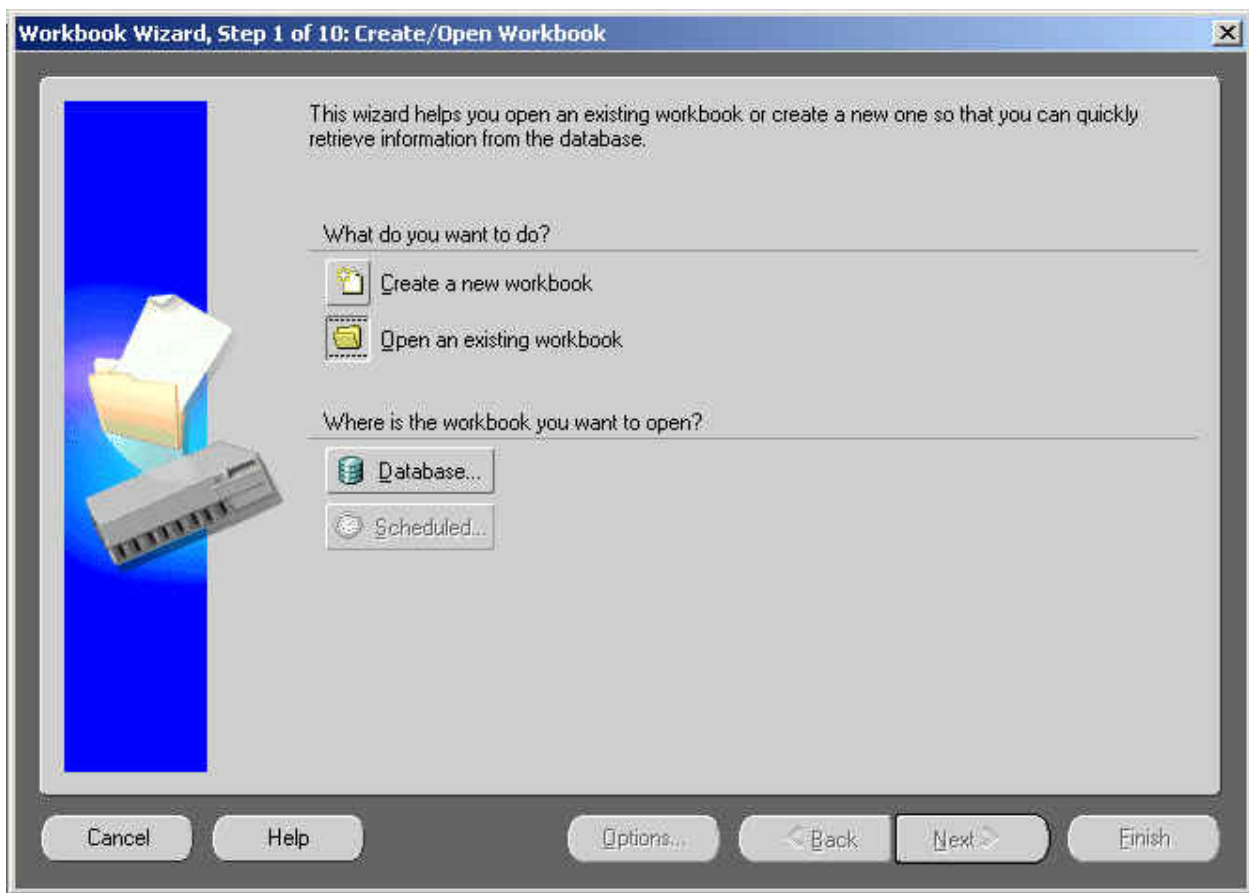| |
|---|
| Oracle Discoverer |
| N → Create/Open Workbook |
| Connect to Oracle Discoverer |

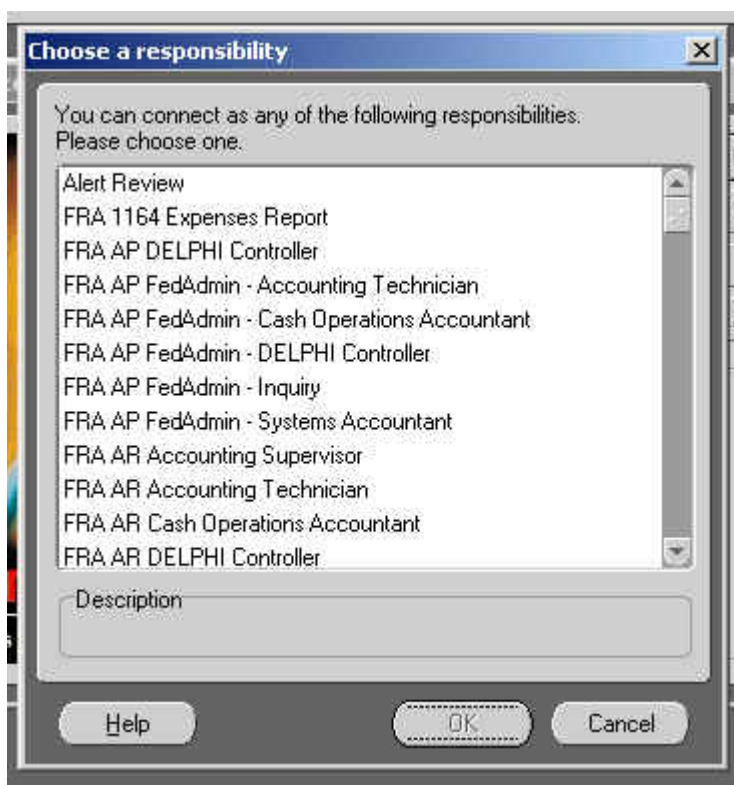1. In the Connect to Oracle Discoverer window, enter the requested information.

Using Discoverer 4i Web

2.   Select a responsibility.

Workbook Wizard, Step 1 of 10: Create/Open Workbook

This wizard helps you open an existing workbook or create a new one so that you can quickly retrieve information from the database.

What do you want to do?

Create a new workbook

Open an existing workbook

Cancel Help Options... Back Next Finish

3. Select the folder icon "Open An Existing Workbook".

Workbook Wizard, Step 1 of 10: Create/Open Workbook

This wizard helps you open an existing workbook or create a new one so that you can quickly retrieve information from the database.

What do you want to do?

Create a new workbook

Open an existing workbook

Where is the workbook you want to open?

Database...

Scheduled...

Cancel | Help | Options... | Back | Next > | Finish

4. Select where the existing workbook is located. This will always be located on the Database.

Using Discoverer 4i Web
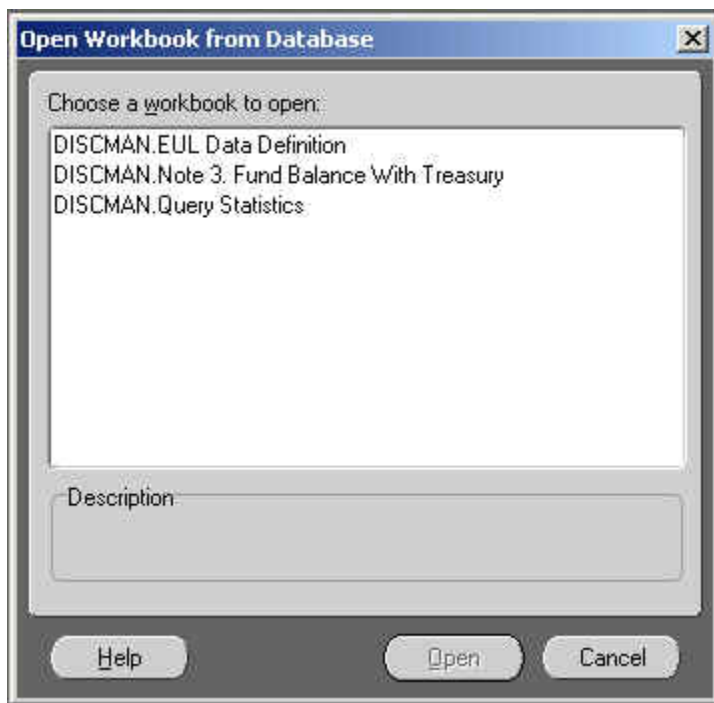
5. Select the desired workbook from the list of values.
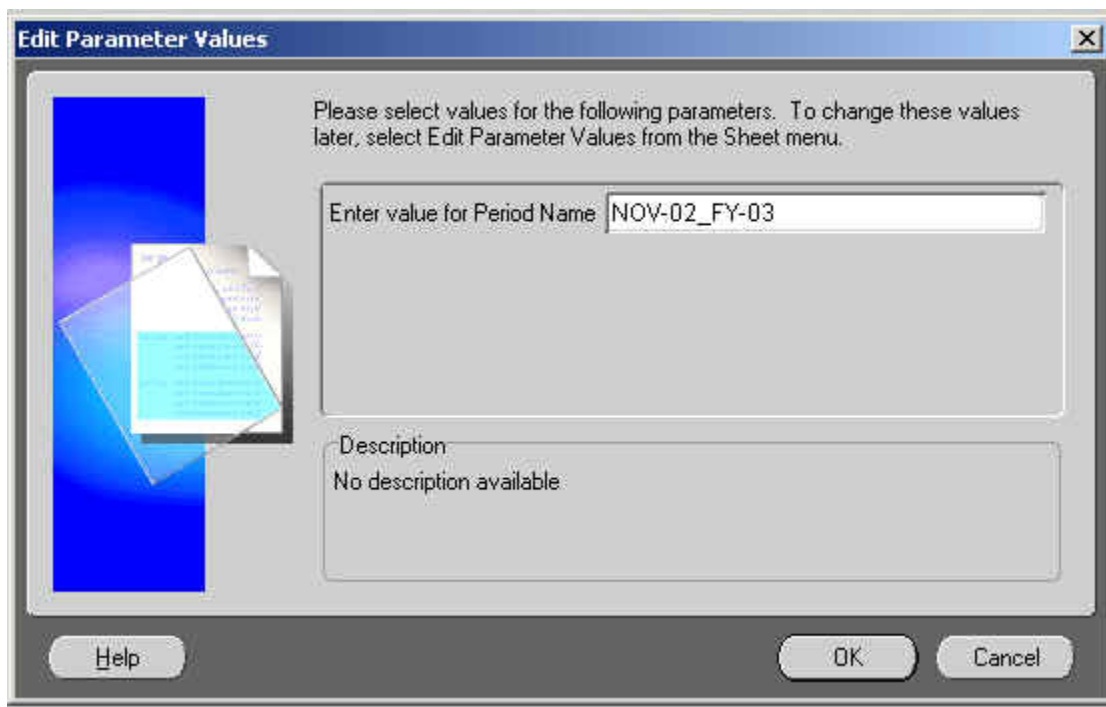
6. Enter any updates to Parameter Values.

Note 3. Fund Balance With Treasury
Period: NOV-02_FY-03   currency USD
Submitted 04-DEC-02 – 11.21.53 AM

	Type	Entity Assets	Non Entity Assets	FY 2001 TOTAL
1	OTHER FUND TYPES	<$91,266,506>	$11,454,995	<$79,811,510>
2	APPROPRIATED FUNDS	$2,567,705,343	<$1>	$2,567,705,342
3	TOTAL	$2,476,438,838	$11,454,994	$2,487,893,832

7.   The Report is executed and displayed.

Using Discoverer 4i Web
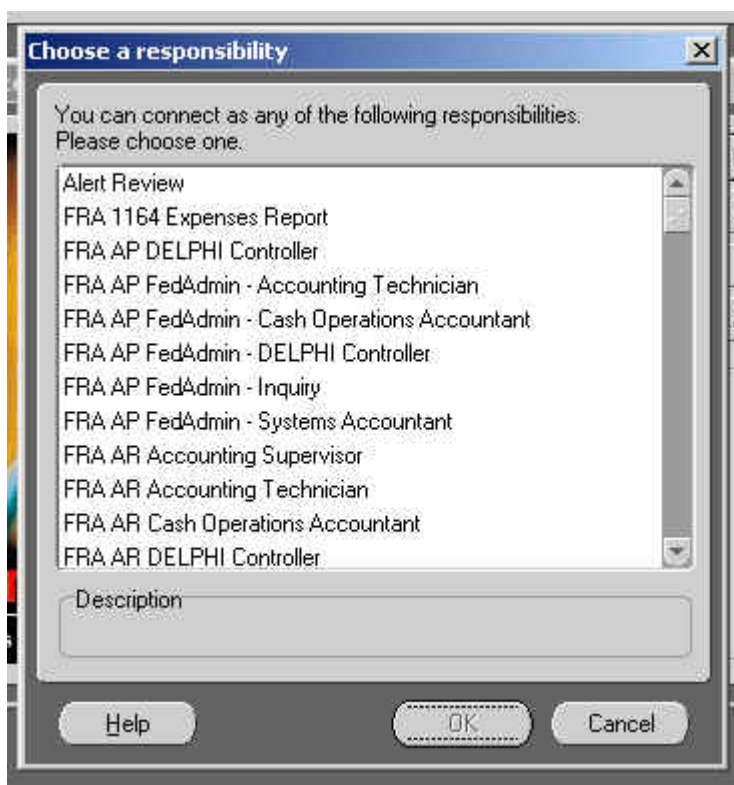
Creating a New Workbook

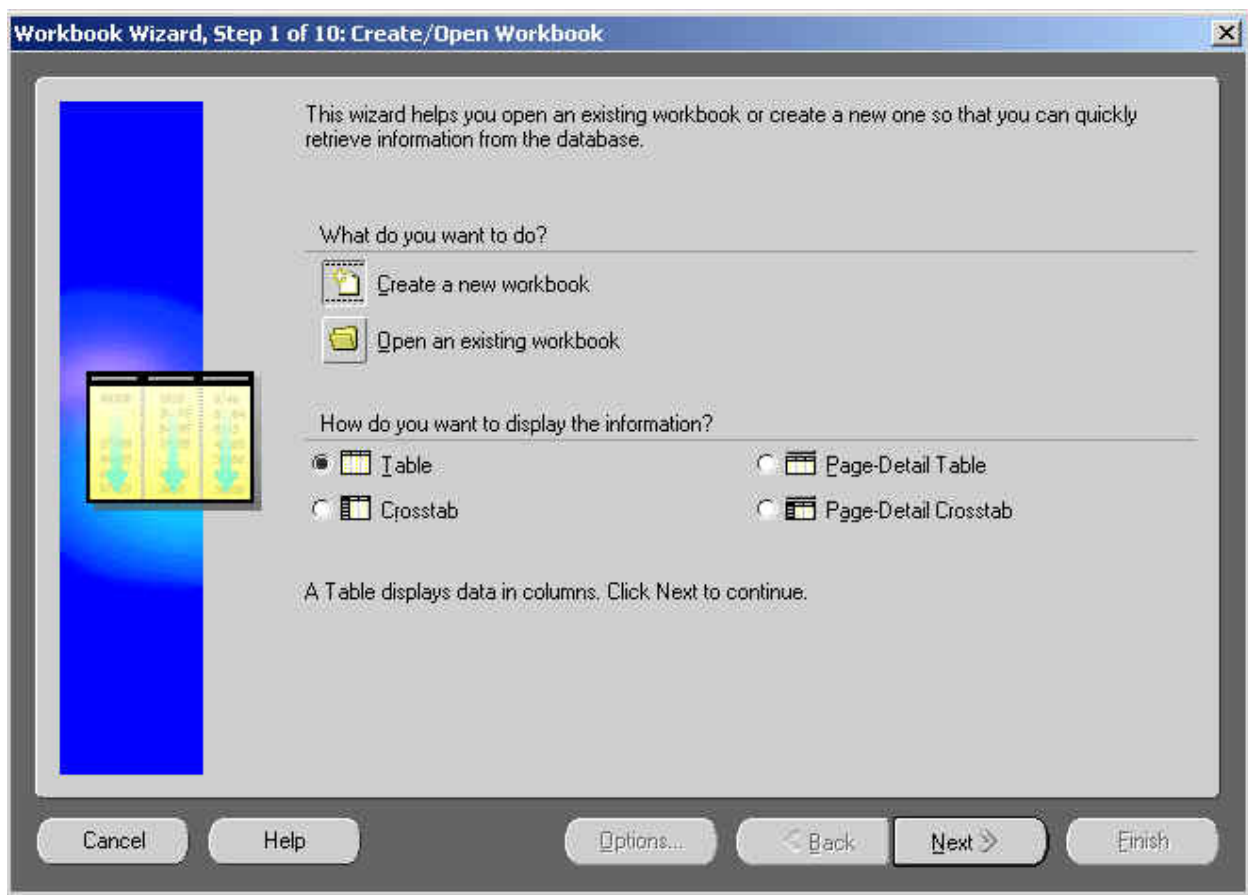| |
|---|
| Oracle Discoverer |
| N → Create/Open Workbook |
| Connect to Oracle Discoverer |

1. In the Connect to Oracle Discoverer window, enter the requested information.

Using Discoverer 4i Web

2. Select a responsibility.
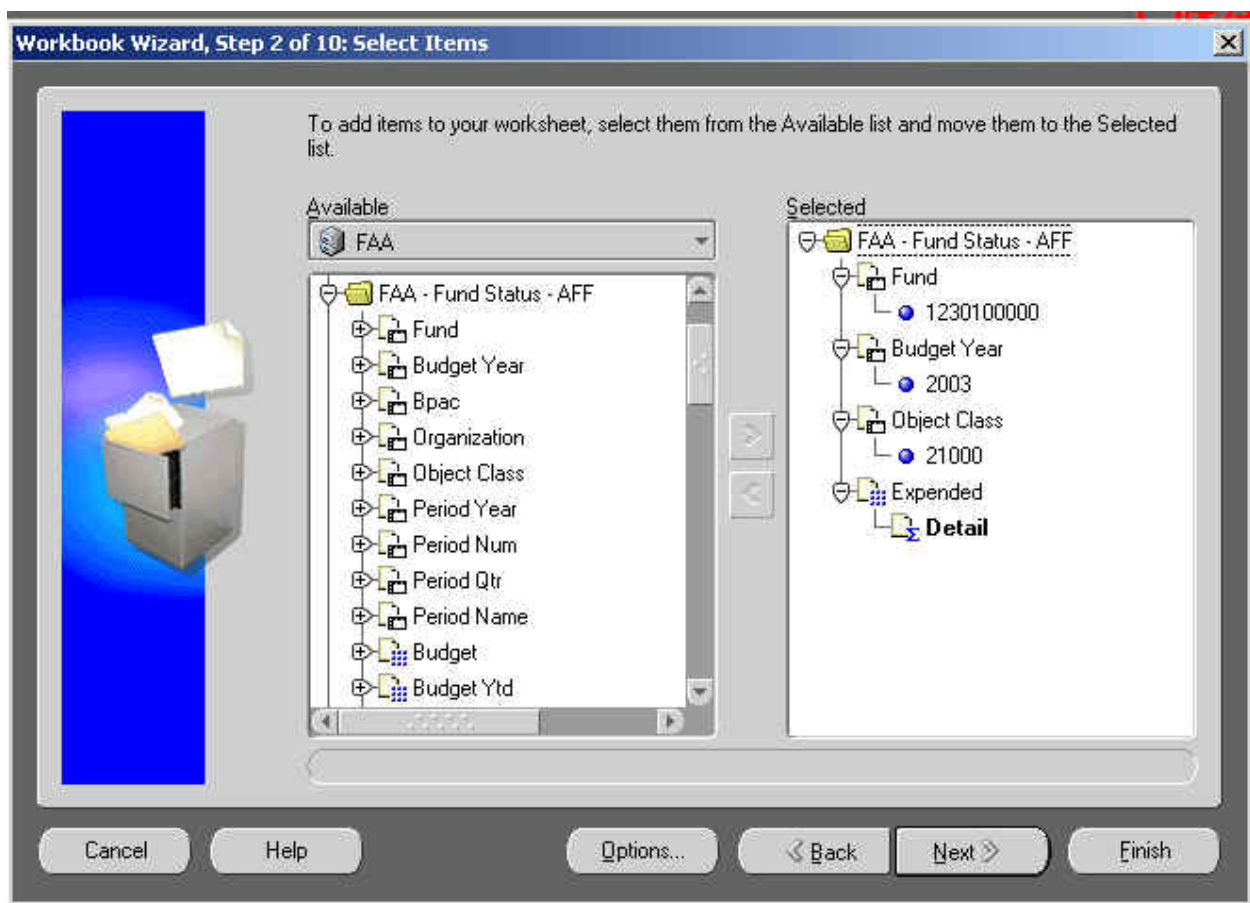
3.   Select this icon to create a new workbook.

4. Once this has been selected you will be prompted to select a report layout type.

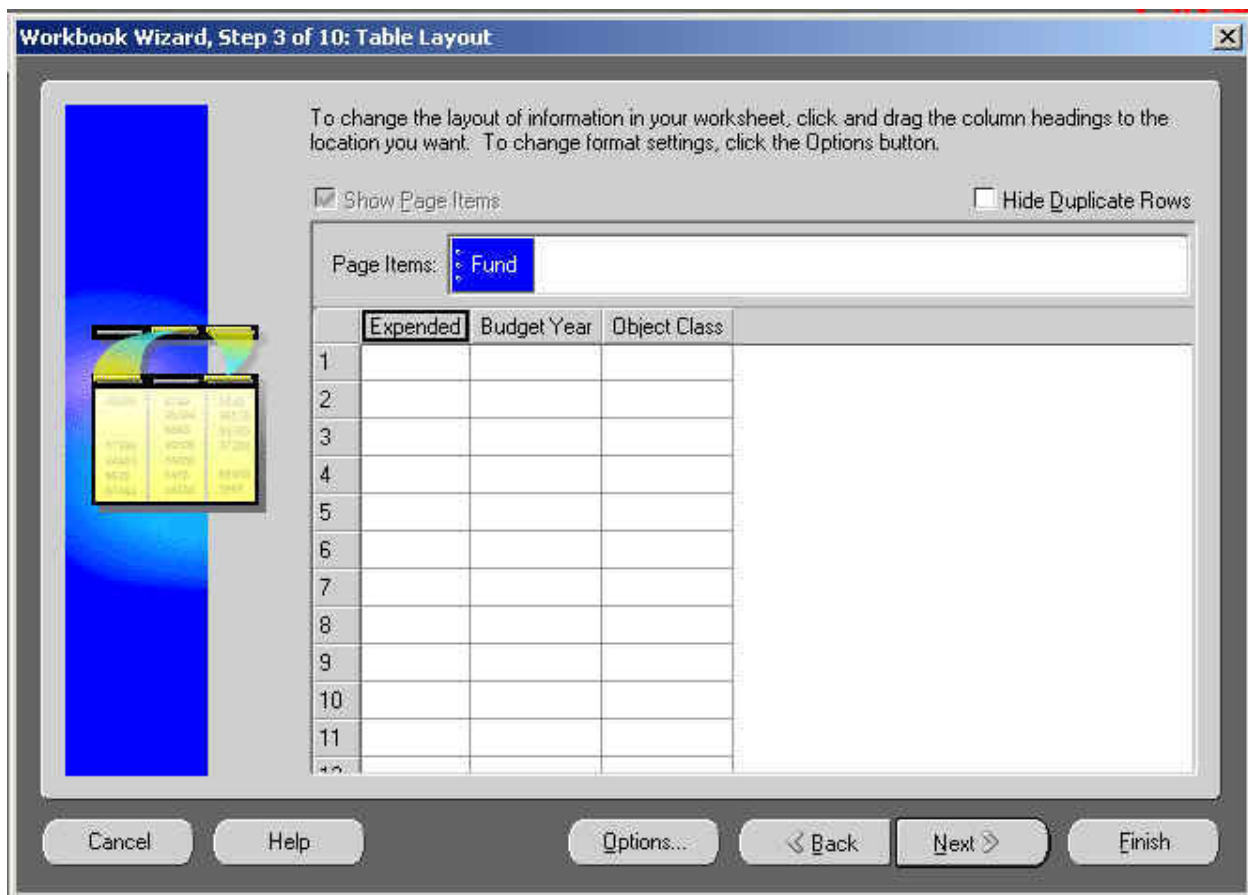**Workbook Wizard, Step 1 of 10: Create/Open Workbook**

This wizard helps you open an existing workbook or create a new one so that you can quickly retrieve information from the database.

What do you want to do?

Create a new workbook

Open an existing workbook

How do you want to display the information?

- Table
- Crosstab
- Page-Detail Table
- Page-Detail Crosstab

A Table displays data in columns. Click Next to continue.

Cancel   Help   Options...   Back   Next   Finish
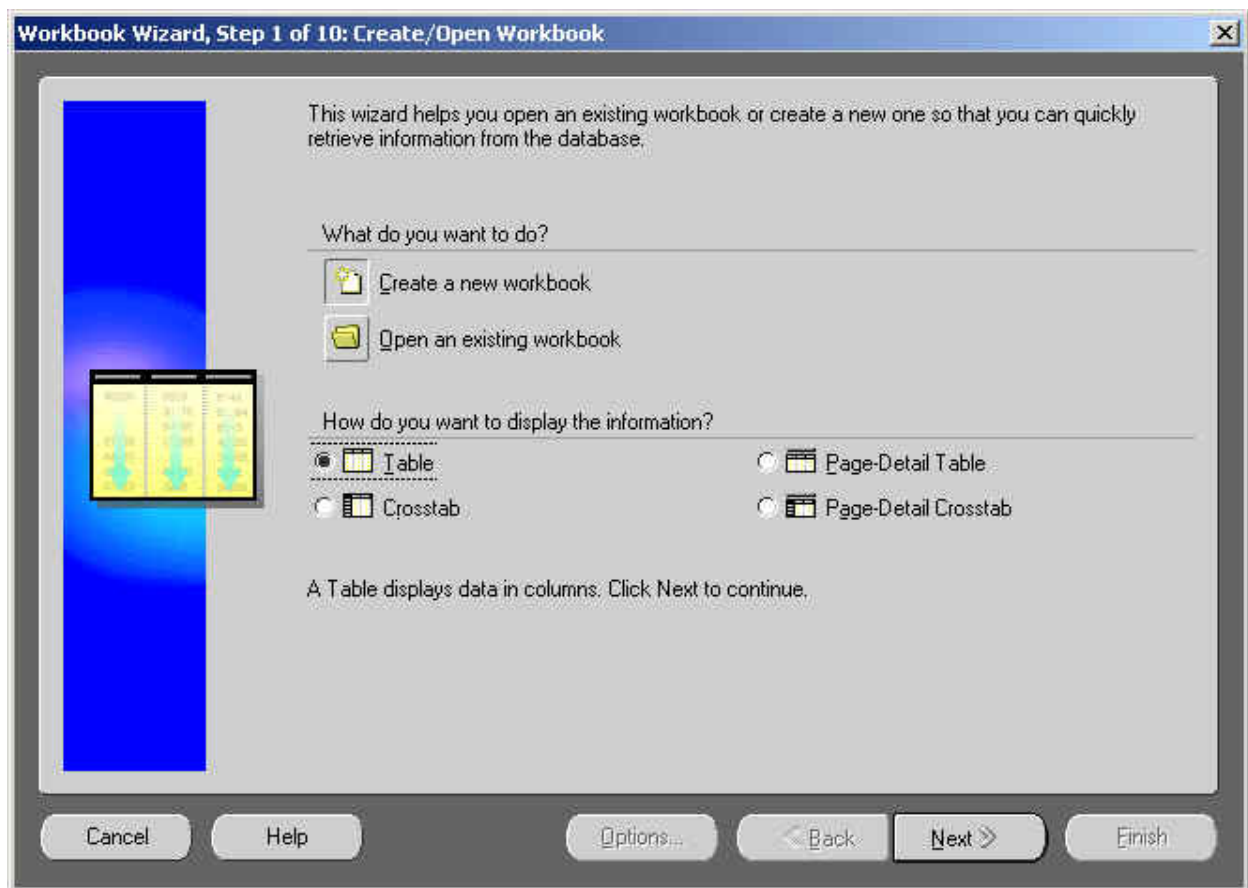
5.   Table Layout will provide a layout in columns. If you want this layout select Next and continue through the Workbook Wizard.

Using Discoverer 4i Web

6. Crosstab Layout displays data in both rows and columns and allows you to pivot items along the top and side axes. If you want this layout click next and continue through the Workbook Wizard.
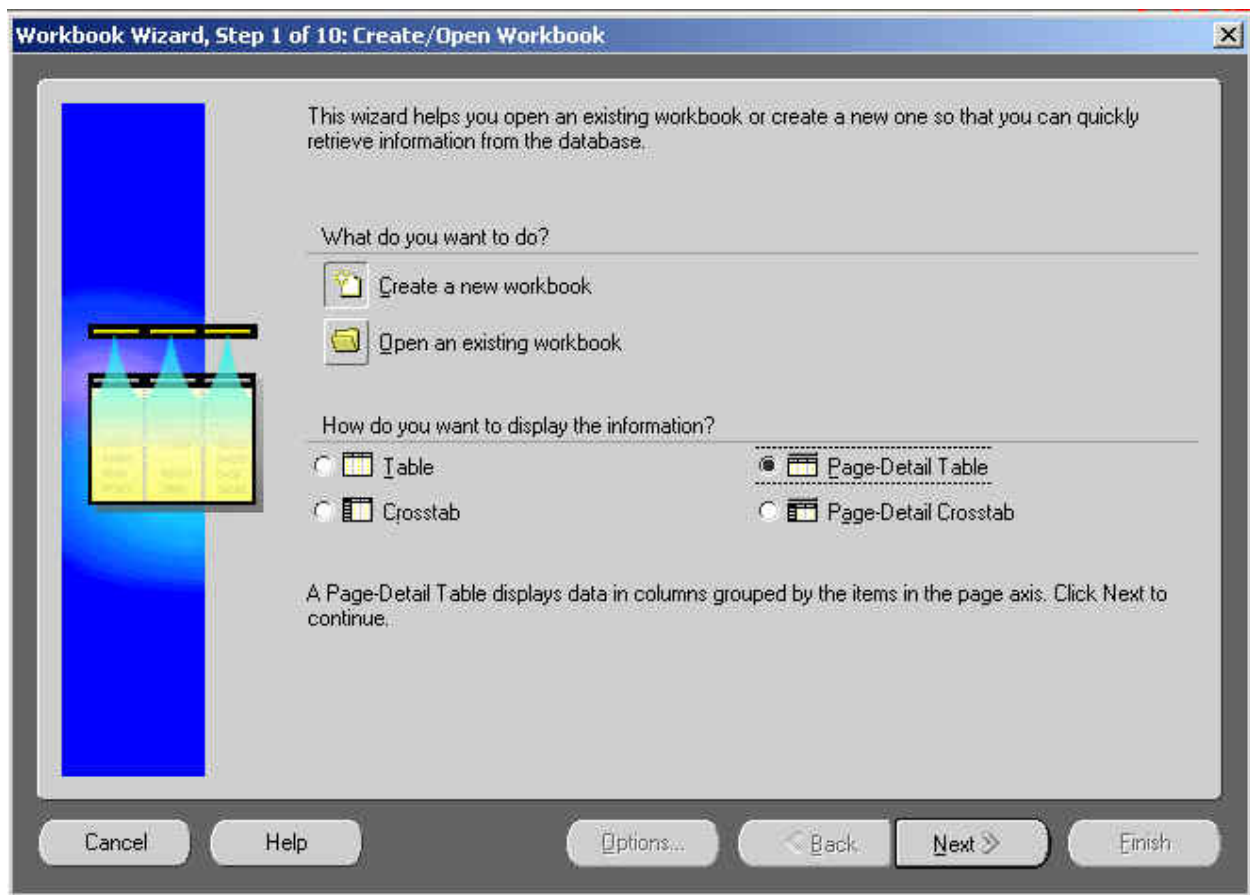
7. Page Detail Table displays data in columns grouped by the items in page axis. If you want this layout select Next and continue through the Workbook Wizard.

Using Discoverer 4i Web

Workbook Wizard, Step 1 of 10: Create/Open Workbook

This wizard helps you open an existing workbook or create a new one so that you can quickly retrieve information from the database.

What do you want to do?

- Create a new workbook
- Open an existing workbook

How do you want to display the information?

- Table
- Crosstab
- Page-Detail Table
- Page-Detail Crosstab

A Page-Detail Crosstab displays information in both rows and columns grouped by the items in the page axis. You can also pivot items along the top and side axes. Click Next to continue.

Cancel   Help   Options...   Back   Next   Finish

---

8. Page Detail Crosstab displays information in both rows and columns grouped by the items in the page axis. If you want this layout select Next and continue through the Workbook Wizard.

Creating a Table Layout Workbook

Oracle Discoverer
N → Create/Open Workbook
Connect to Oracle Discoverer

1. In the Connect to Oracle Discoverer window, enter the requested information.

Using Discoverer 4i Web

Choose a responsibility

You can connect as any of the following responsibilities.
Please choose one.

Alert Review
FRA 1164 Expenses Report
FRA AP DELPHI Controller
FRA AP FedAdmin - Accounting Technician
FRA AP FedAdmin - Cash Operations Accountant
FRA AP FedAdmin - DELPHI Controller
FRA AP FedAdmin - Inquiry
FRA AP FedAdmin - Systems Accountant
FRA AR Accounting Supervisor
FRA AR Accounting Technician
FRA AR Cash Operations Accountant
FRA AR DELPHI Controller

Description

Help   OK   Cancel

2.   Select a responsibility.

Using Discoverer 4i Web

Workbook Wizard, Step 1 of 10: Create/Open Workbook

This wizard helps you open an existing workbook or create a new one so that you can quickly retrieve information from the database.

What do you want to do?

　　Create a new workbook

　　Open an existing workbook

How do you want to display the information?

　● Table　　　　　　　　　　　　　○ Page-Detail Table
　○ Crosstab　　　　　　　　　　　○ Page-Detail Crosstab

A Table displays data in columns. Click Next to continue.

Cancel　　Help　　　　Options...　　Back　　Next　　Finish

3. 　Create a new workbook　　Select this icon to create a new workbook.

4. 　Once this has been selected you will be prompted to select a report layout type.
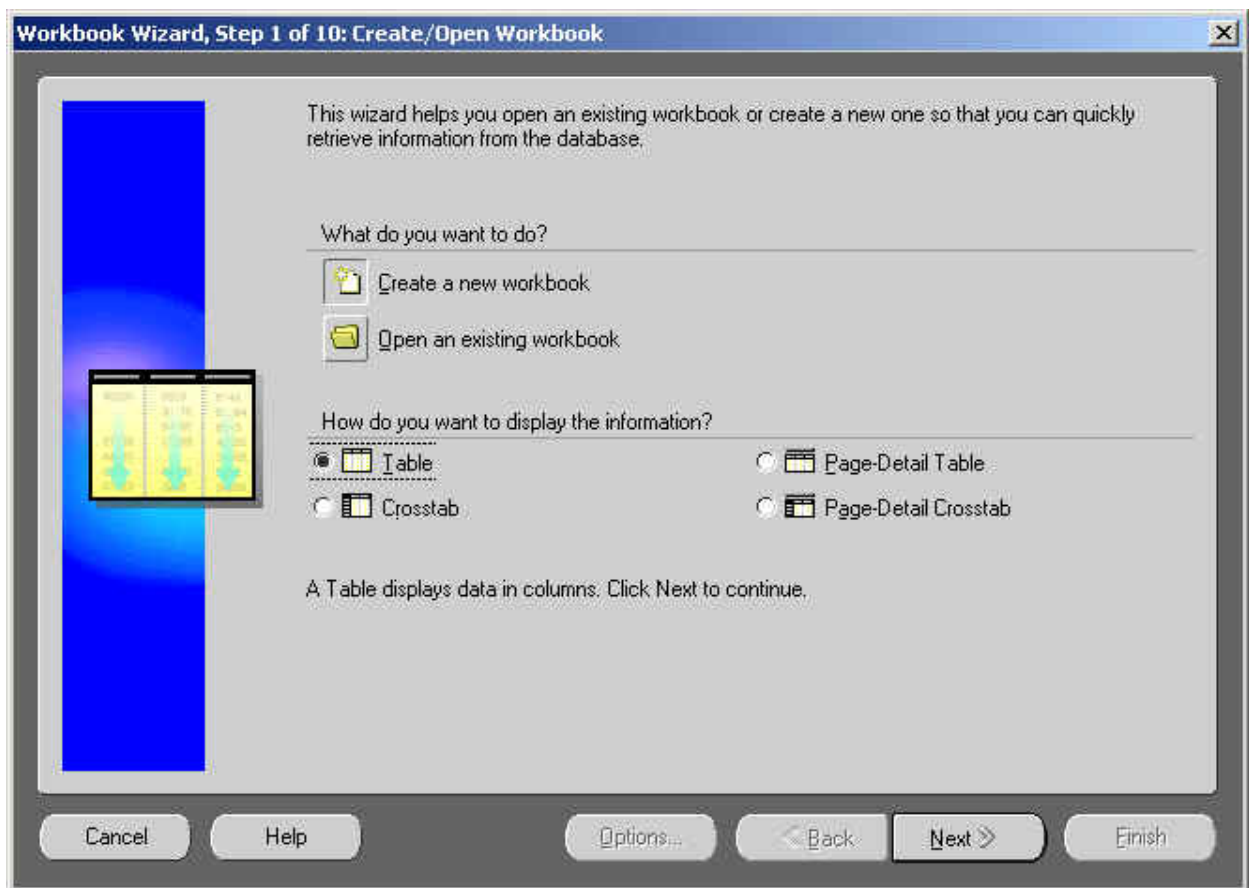
5. Table Layout will provide a layout in columns.

6. Select Next to continue with the Workbook Wizard.
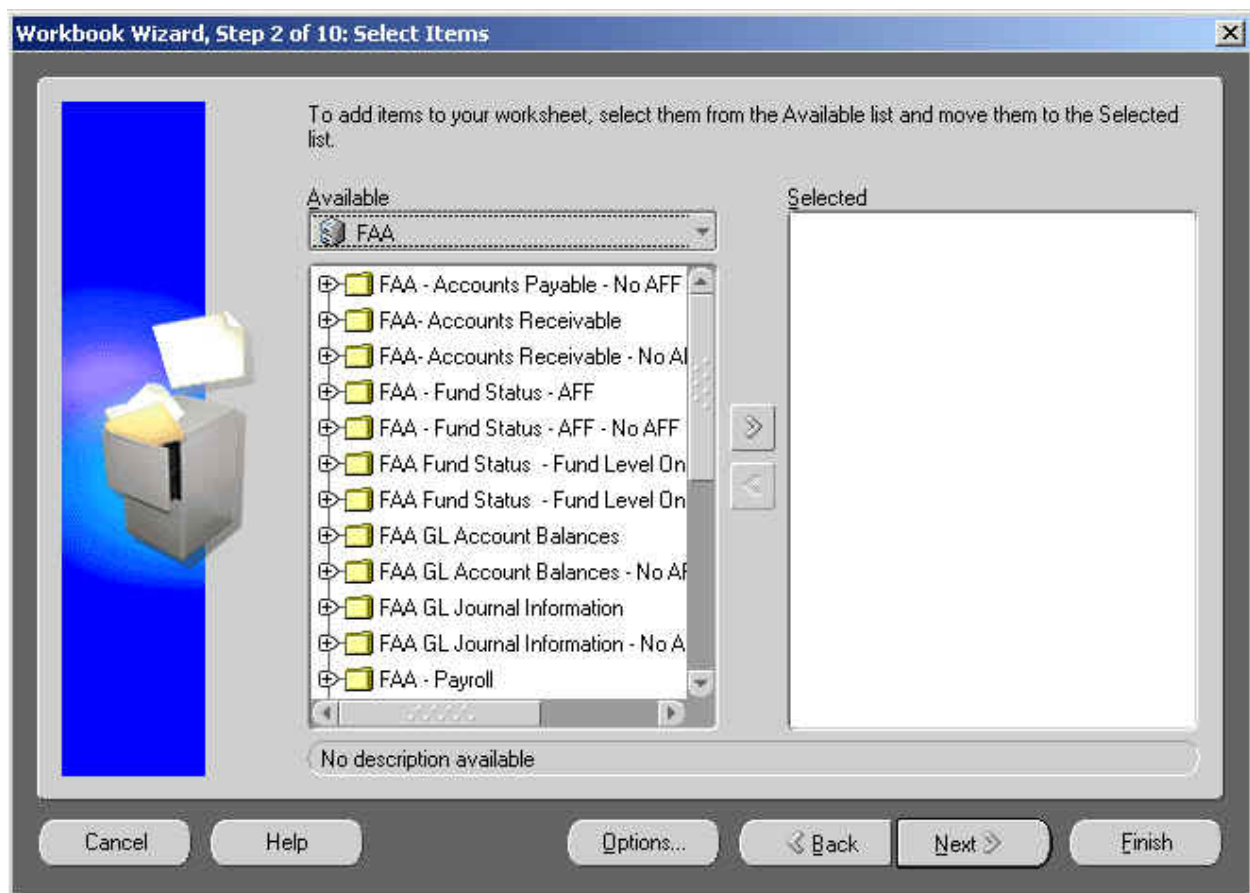
7. Under the Available area select the desired business areas.

8. Select and drag the desired item(s) from the Available List of Values to the Selected Area or select the desired item(s) from the Available List of Values select the → arrow key to move them over to the Selected area.

Workbook Wizard, Step 2 of 10: Select Items

To add items to your worksheet, select them from the Available list and move them to the Selected list.

Available
FAA

FAA - Fund Status - AFF
- Fund
- Budget Year
- Bpac
- Organization
- Object Class
- Period Year
- Period Num
- Period Qtr
- Period Name
- Budget
- Budget Ytd

Selected
FAA - Fund Status - AFF
- Fund
  - 1230100000
- Budget Year
  - 2003
- Object Class
  - 21000
- Expended
  - **Detail**

Cancel   Help   Options...   ≪ Back   Next ≫   Finish

9.   Select Next to Continue with the Workbook Wizard.

Using Discoverer 4i Web

10. You may choose to change the layout of your data in the report by selecting and dragging information from the Page Axis to the Side Axis.

11. Make changes to the format by selecting the (B) Options.

OPTIONS		
Field Name	**Comments**	**Required?**
Show Area		
Title	Select to view or not to view the title on the header of the workbook.	Yes
Horizontal and Vertical Cell Gridlines	Select to view your workbook displayed with or without gridlines.	Yes
Null Values As	You can choose your Null Values to be displayed as Null-blank, -, N/A or 0.	Yes
Values That Cannot Be Aggregated As	Can be displayed as Null-blank, -, N/A or 0.	Yes
Style Area		
Row Numbers	You can check this field to display your workbook with row numbers.	Yes
Screen Page Layout Area		
Rows Per Screen Page	Select how many rows you would like to see displayed on your worksheet.	Yes

12. Select Next to continue to Step 4 of the Workbook Wizard.

Using Discoverer 4i Web

13. You can apply formats to the item(s) in the list of values.

14. Options are available to format the data, format the heading or edit the heading. You can change the number, font size, font color etc.

15. After changes have been made select Next to continue to Step 5 of the Workbook Wizard.

Using Discoverer 4i Web

16. You can apply or edit conditions to a given area in the list of values. Such as, add a range for Object Class.

17. You can view conditions for a given item on the list of values.

18. After changes have been a sorting feature added to any selected items.

Using Discoverer 4i Web

19. You can choose to have a sorting feature added to any selected items.

20. After changes have been made select Next to continue to Step 7 of the Workbook Wizard.
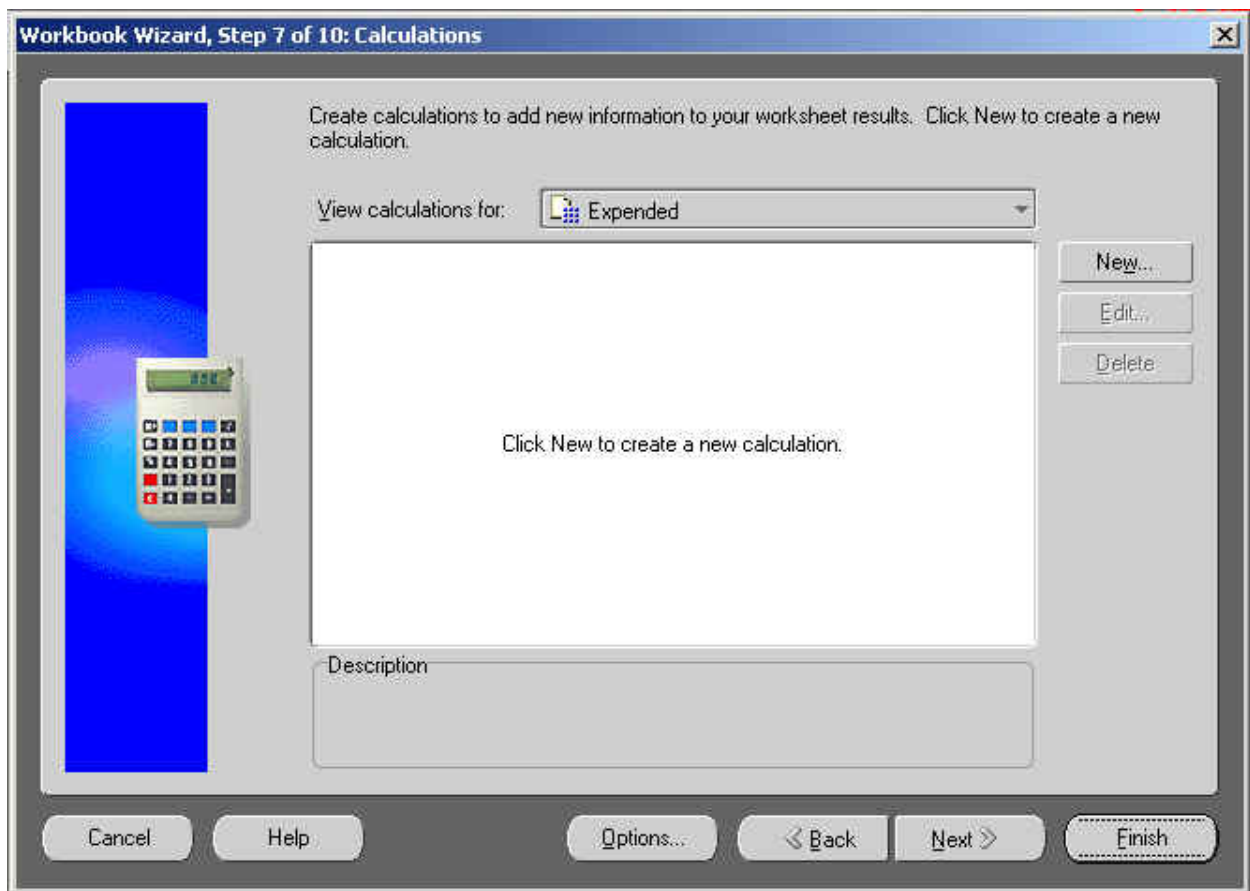
21. You can choose to have a calculation added to any given item from the list of values.
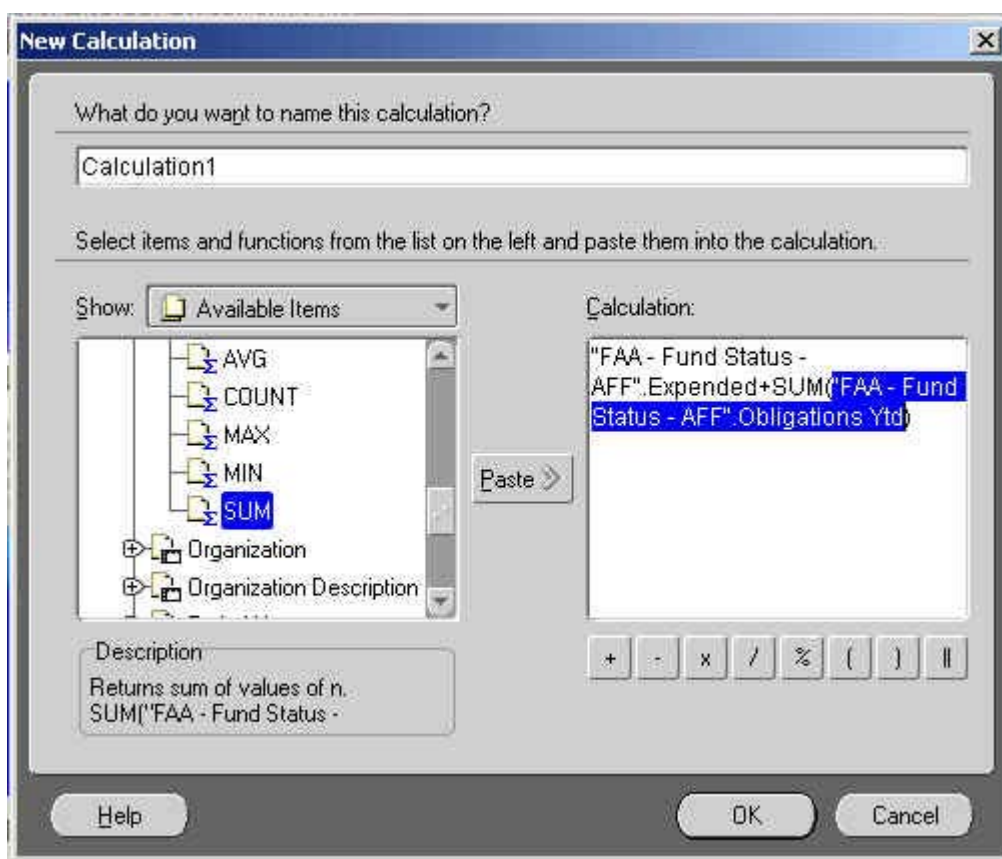
22. After changes have been made select Next to continue to Step 8 of the Workbook Wizard.
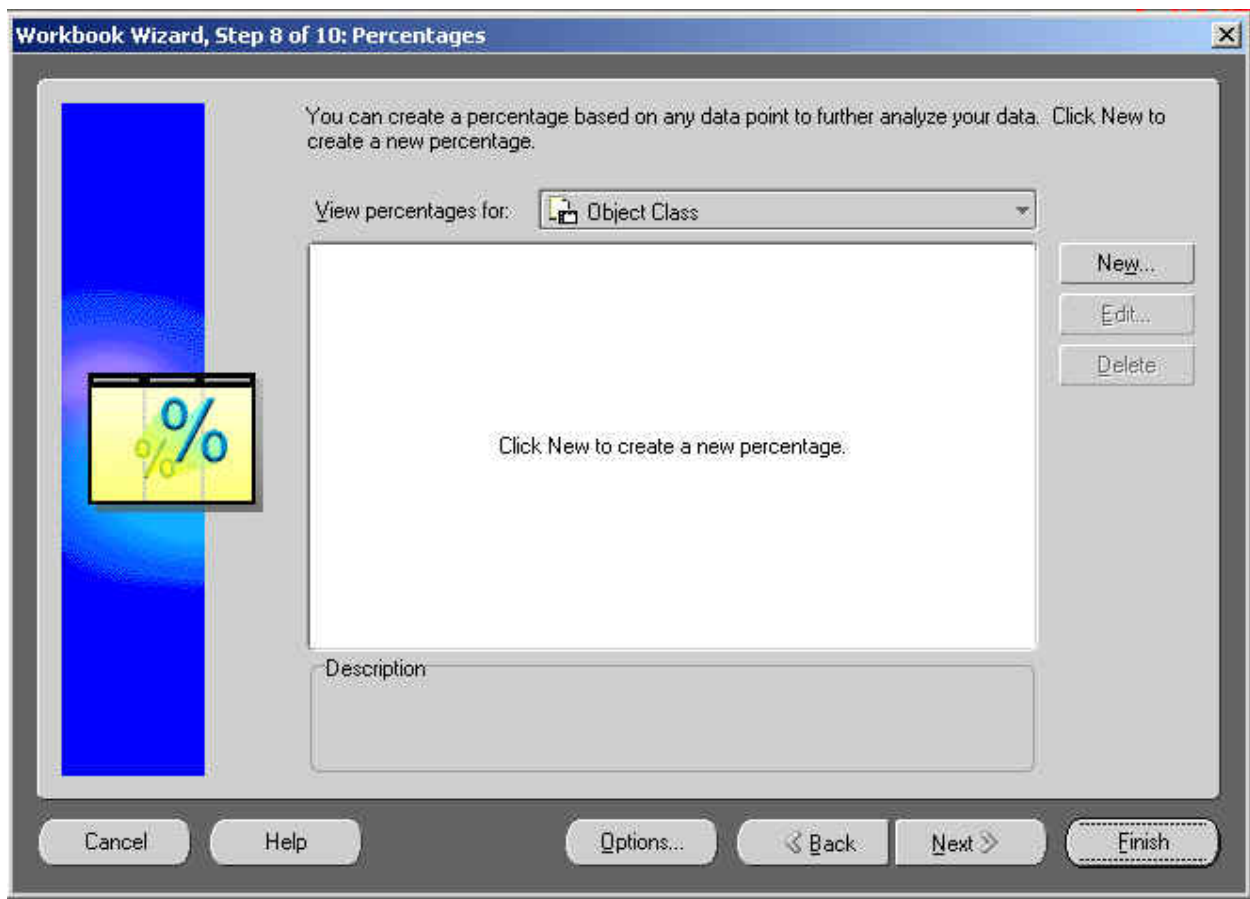
23. You can choose to add percentage calculations to further analyze the data.

24. After changes have been made select Next to continue to Step 9 of the Workbook Wizard.
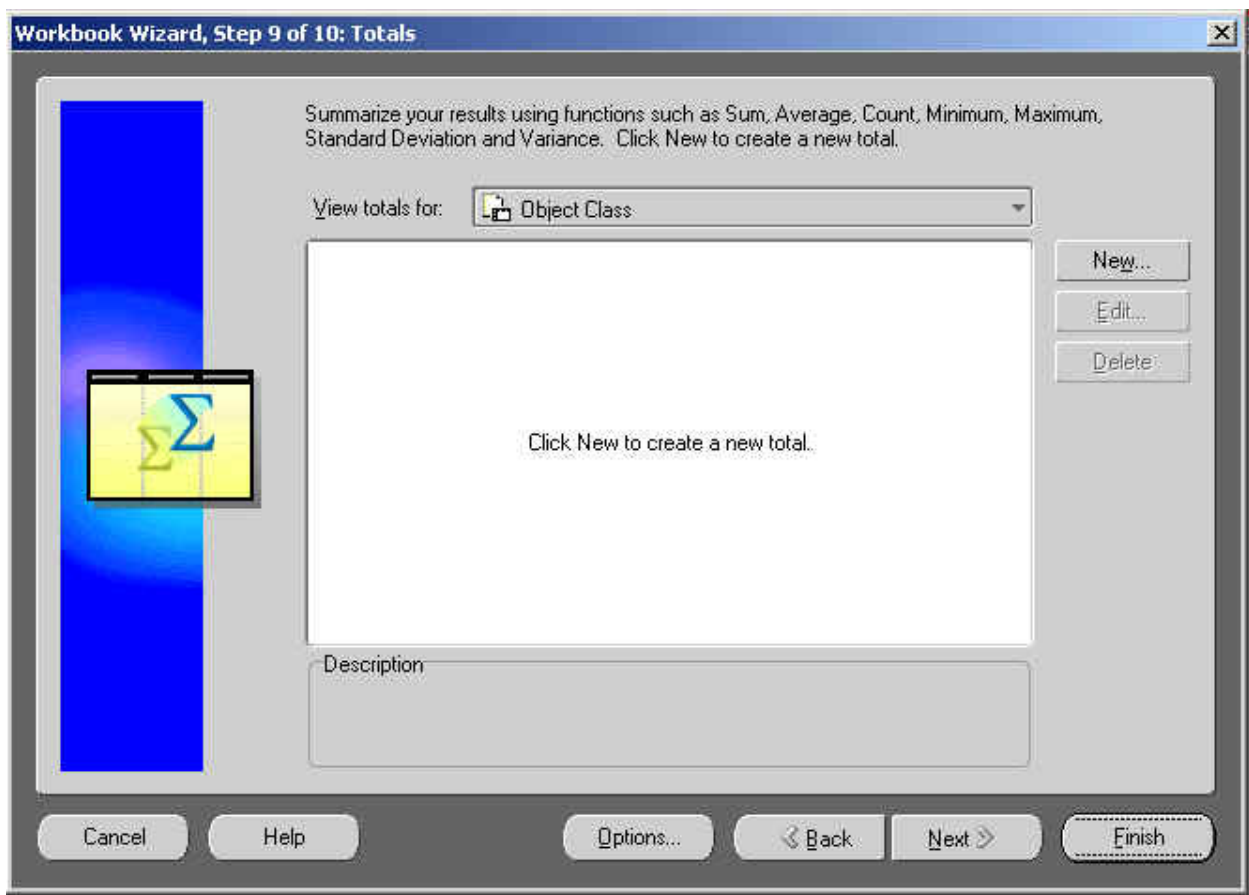
25. Choose to summarize your results using functions such as Sum, Average, Standard Deviation and Variance to create totals.

26. After changes have been made select Next to continue to Step 10 of the Workbook Wizard.

27. You can choose to add parameters as a placeholder for a value in a condition or calculation.

28. After changes have been made select Finish to display your workbook.

29. You will receive an estimated time of when to expect the final results of your workbook.

Creating a Crosstab Layout Workbook

> Oracle Discoverer
>
> N → Create/Open Workbook
>
> Connect to Oracle Discoverer

1. In the Connect to Oracle Discoverer window, enter the requested information.

Choose a responsibility

You can connect as any of the following responsibilities.
Please choose one.

Alert Review
FRA 1164 Expenses Report
FRA AP DELPHI Controller
FRA AP FedAdmin - Accounting Technician
FRA AP FedAdmin - Cash Operations Accountant
FRA AP FedAdmin - DELPHI Controller
FRA AP FedAdmin - Inquiry
FRA AP FedAdmin - Systems Accountant
FRA AR Accounting Supervisor
FRA AR Accounting Technician
FRA AR Cash Operations Accountant
FRA AR DELPHI Controller

Description

Help   OK   Cancel

2. Select a responsibility.

3. Select this icon to create a new workbook.

4. Once this has been selected you will be prompted to select a report layout type.

Using Discoverer 4i Web

5. Crosstab Layout displays data in both rows and columns and allows you to pivot items along the top and side axes.

6. Select Next to continue on to Step 2 of the Workbook Wizard.
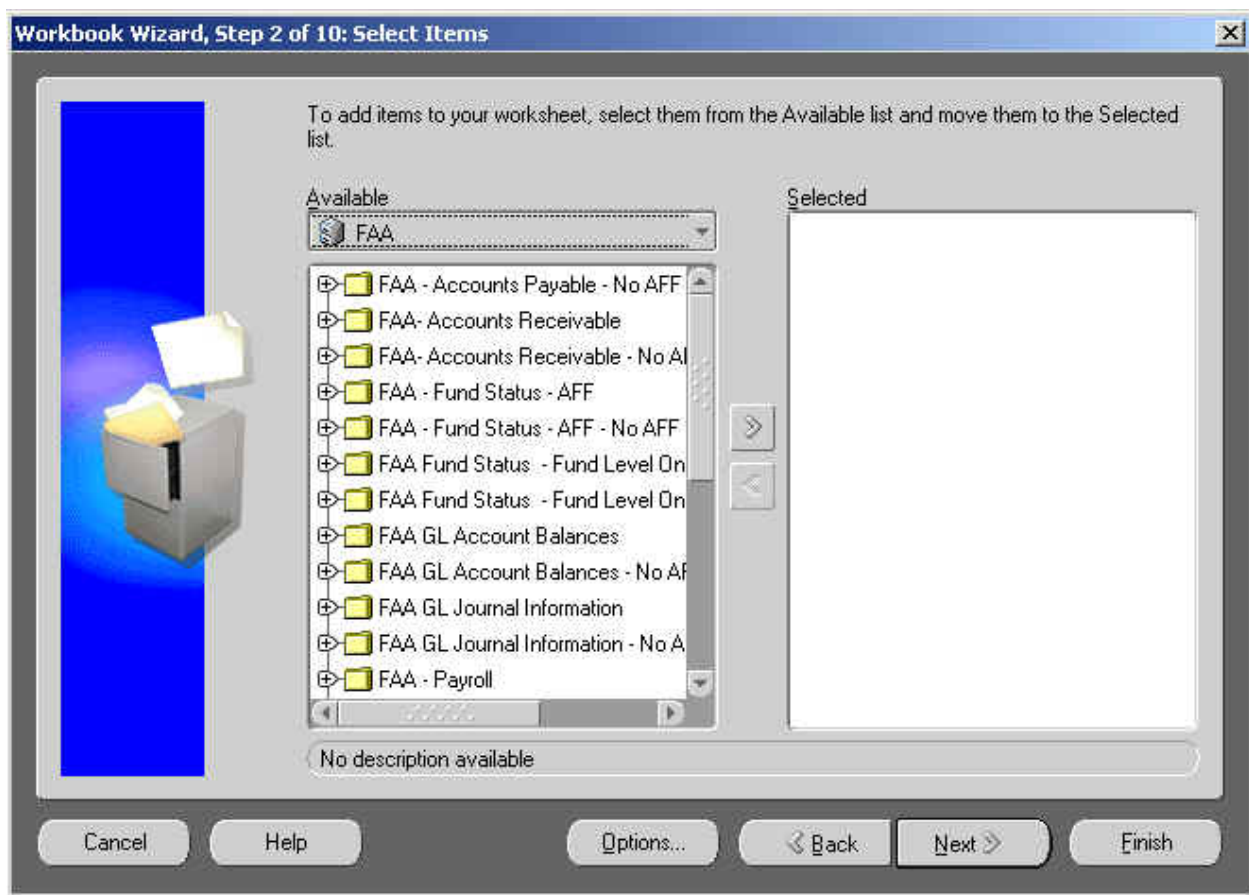
Using Discoverer 4i Web

Workbook Wizard, Step 2 of 10: Select Items

To add items to your worksheet, select them from the Available list and move them to the Selected list.

Available

FAA

- FAA - Accounts Payable - No AFF
- FAA- Accounts Receivable
- FAA- Accounts Receivable - No Al
- FAA - Fund Status - AFF
- FAA - Fund Status - AFF - No AFF
- FAA Fund Status - Fund Level On
- FAA Fund Status - Fund Level On
- FAA GL Account Balances
- FAA GL Account Balances - No AF
- FAA GL Journal Information
- FAA GL Journal Information - No A
- FAA - Payroll

Selected

No description available

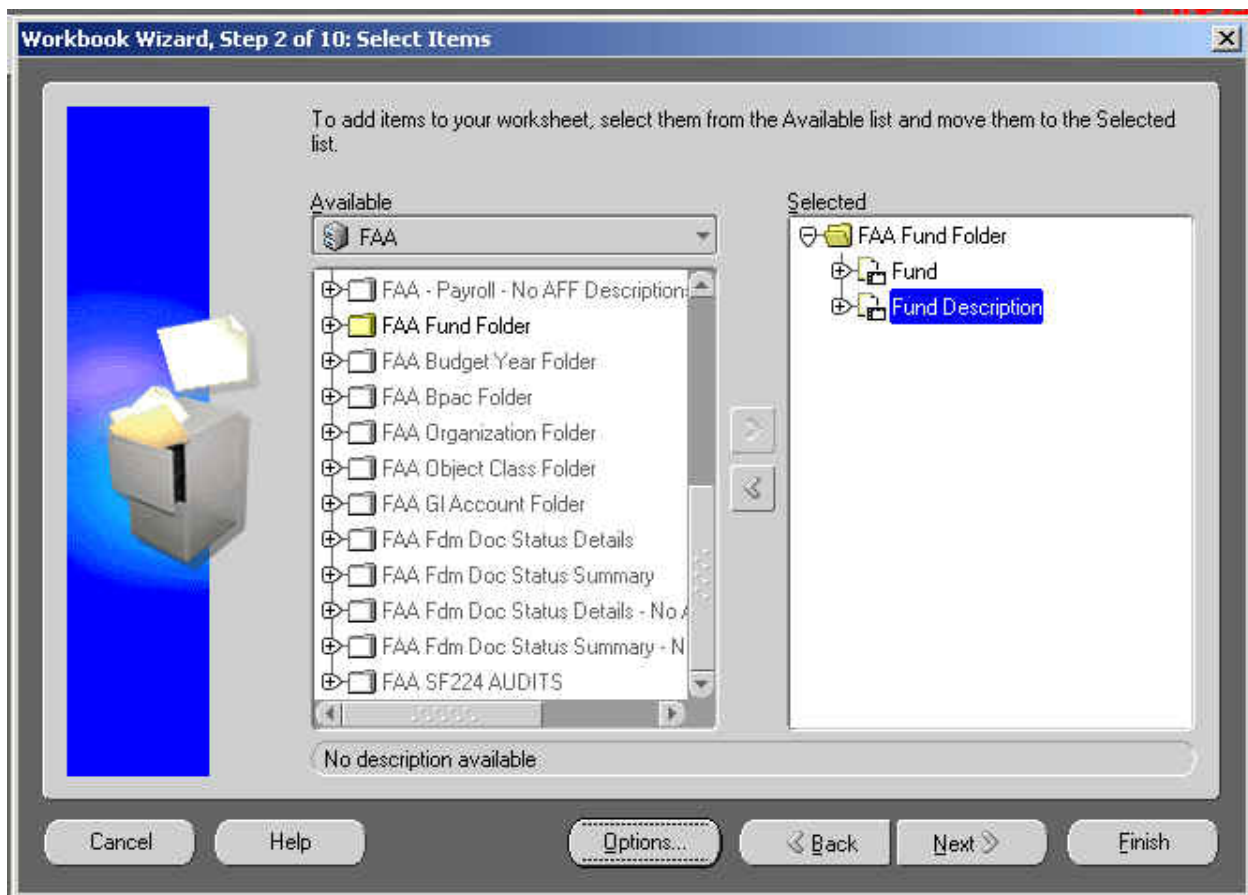Cancel   Help   Options...   Back   Next   Finish

7. Under the Available area select the desired business areas.

8. Select and drag the desired item(s) from the Available List of Values to the Selected Area or select the desired item(s) from the Available List of Values and Select the > arrow key to move them over to the Selected area.

9. Select Next to continue on to Step 3 of the Workbook Wizard.

10. To change the layout of information in your worksheet, Select and drag the row and column headings to the location you want.
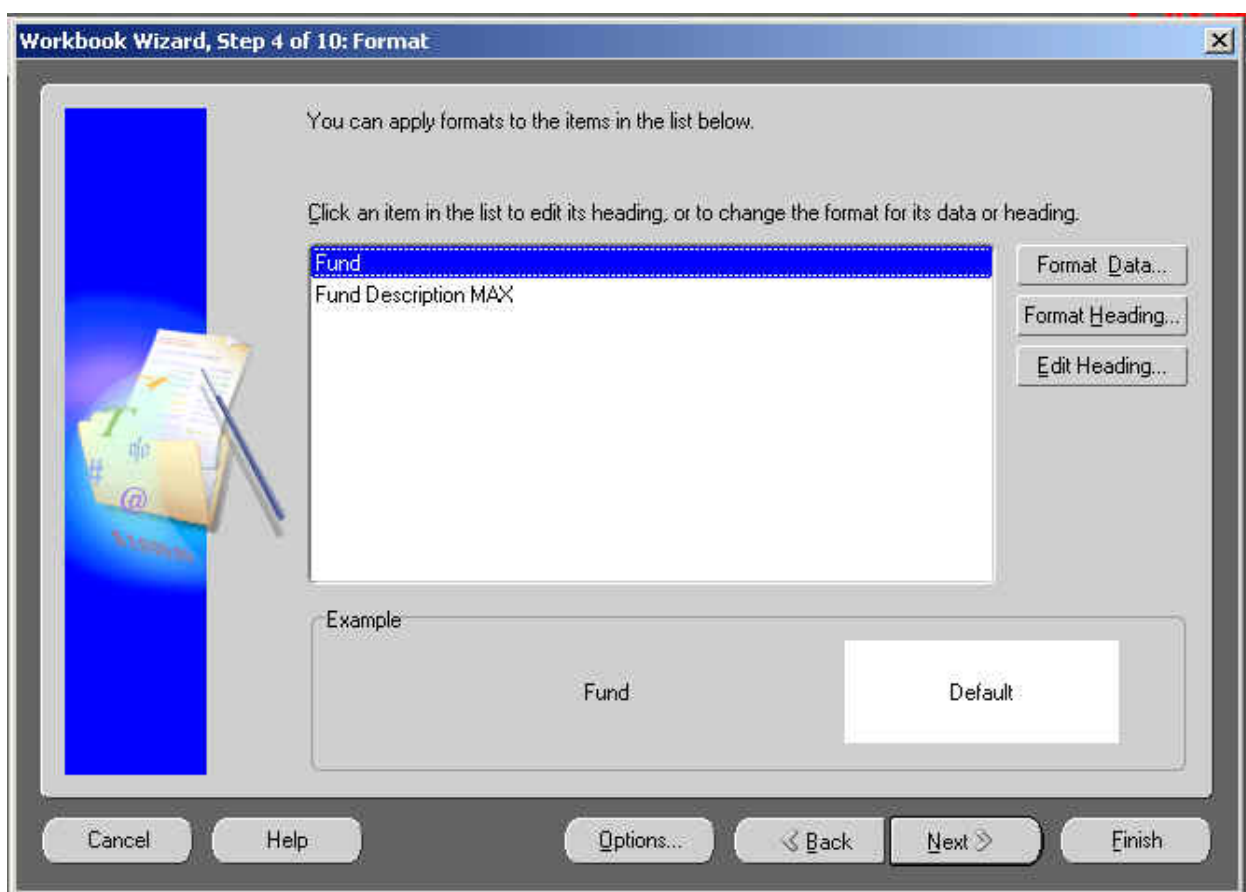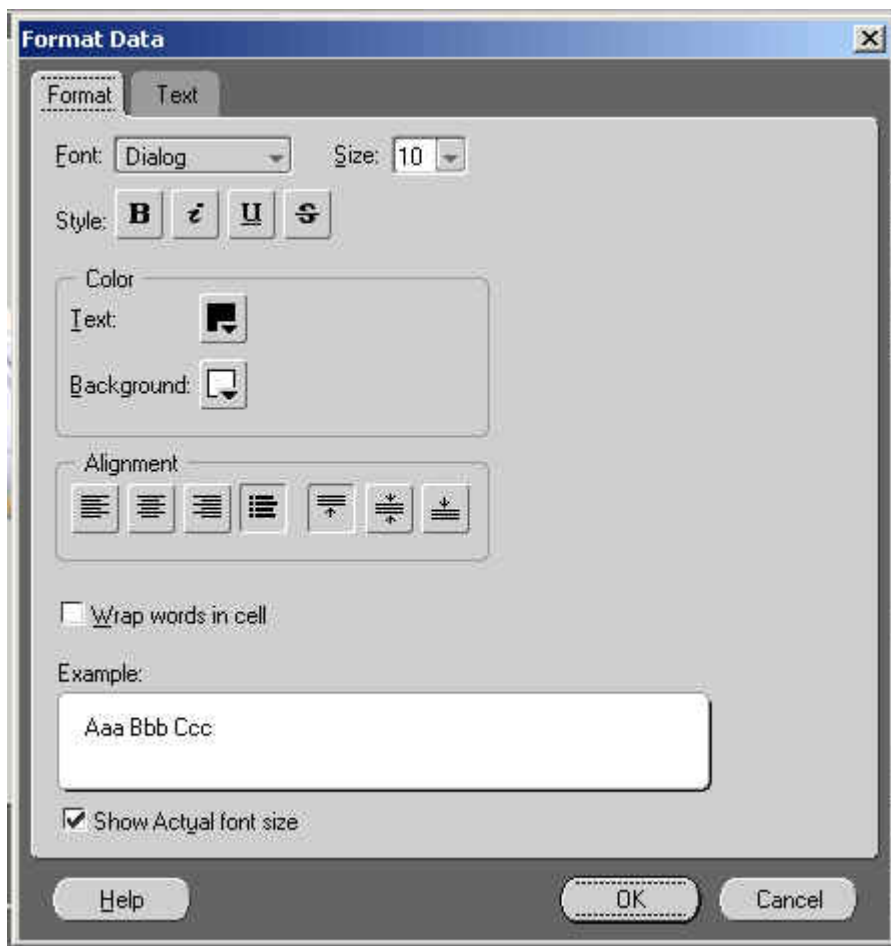
    Note: Must have information available in the white area to create the Crosstab worksheet. You may receive a warning message if information is not available.

11. Make changes to the format by selecting the (B) Options.

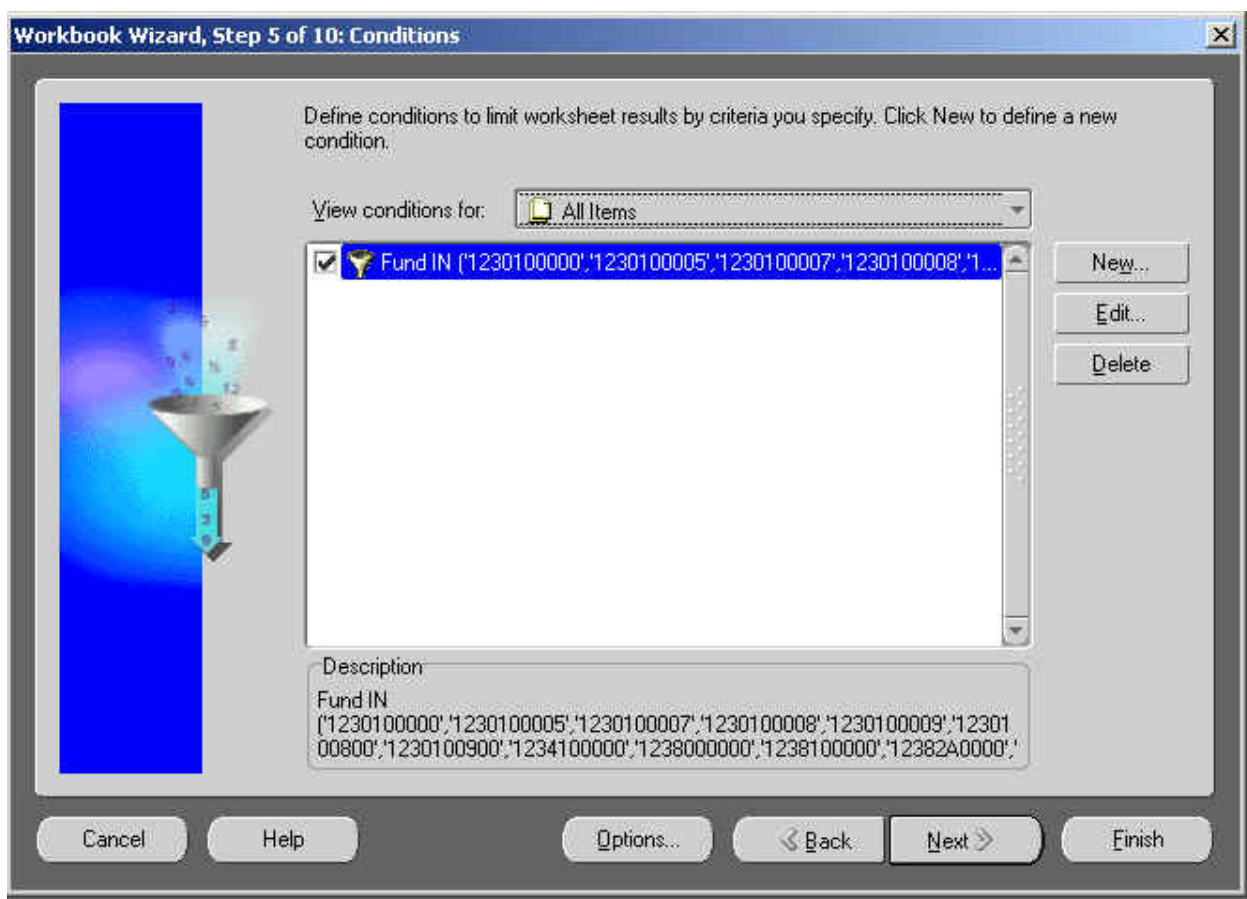| OPTIONS		
Field Name	**Comments**	**Required?**
Show Area		
Title	Select to view or not to view the title on the header of the workbook.	Yes
Horizontal and Vertical Cell Gridlines	Select to view your workbook displayed with or without gridlines.	Yes
Null Values As	You can choose your Null Values to be displayed as Null-blank, -, N/A or 0.	Yes
Values That Cannot Be Aggregated As	Can be displayed as Null-blank, -, N/A or 0.	Yes
Style Area		
Inline	The inline view provides an additional column on the far left of the workbook.	Yes
Outline	The outline view provides for just one mai column on the far left of the workbook.	Yes
Screen Page Layout Area		
Rows Per Screen Page	Select how many rows you would like to see displayed on your worksheet.	Yes

12. Select Next to continue to Step 4 of the Workbook Wizard.

Workbook Wizard, Step 4 of 9: Format

You can apply formats to the items in the list below.

Click an item in the list to edit its heading, or to change the format for its data or heading.

- Budget Year
- Expended
- Fund
- Fund Description MAX
- Object Class
- Object Class Description MAX
- Obligations

Format Data...
Format Heading...
Edit Heading...

Example

Budget Year   Default

Cancel   Help   Options...   Back   Next   Finish

13. You can apply formats to the item(s) in the list of values.

14. Options are available to format the data, format the heading or edit the heading. You can change the number, font size, font color etc.

15. After changes have been made Select Next to continue to Step 5 of the Workbook Wizard.

Using Discoverer 4i Web

Workbook Wizard, Step 5 of 9: Conditions

Define conditions to limit worksheet results by criteria you specify. Click New to define a new condition.

View conditions for: 📄 All Items

☑ 🔽 Budget Year IN ('2003')
☑ 🔽 Fund IN ('1230100000','1230100005','1230100007','1230100008','1...
☑ 🔽 Object Class IN ('121U0')

New...
Edit...
Delete

Description
Budget Year IN ('2003')

Cancel | Help | Options... | « Back | Next » | Finish

16. You can apply or edit conditions to a given area in the list of values. Such as, add a range for Object Class.

Workbook Wizard, Step 6 of 9: Calculations

Create calculations to add new information to your worksheet results. Click New to create a new calculation.

View calculations for: All Items

New...
Edit...
Delete

Click New to create a new calculation.

Description

Cancel   Help   Options...   Back   Next   Finish

17. Create calculations to add new information to your worksheet results.

18. After changes have been made Select Next to continue to Step 7 of the Workbook Wizard.
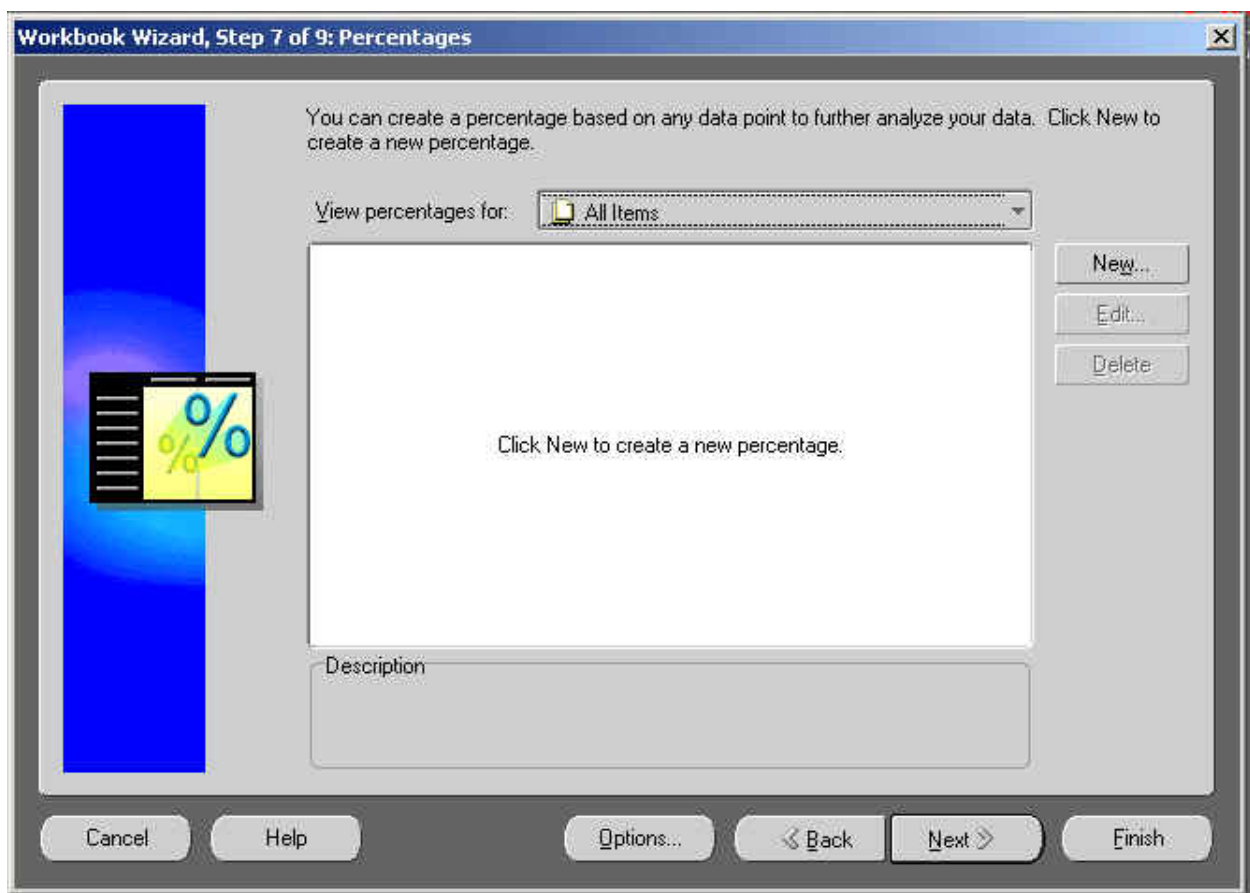
19. You can create percentages to further analyze your data.

20. After changes have been made Select Next to continue to Step 8 of the Workbook Wizard.

Using Discoverer 4i Web

21. Summarize your results using functions such as Sum, Average, Min and Max to create workbook totals.

22. After changes have been made Select Next to continue to continue to Step 9 of the Workbook Wizard.

23. You can choose to add parameters as a placeholder for a value in a condition or calculation.

24. After changes have been made Select Finish to display your workbook.

25. You will receive an estimated time of when to expect the final results of your workbook.

Using Discoverer 4i Web

Creating a Page-Detail Table Layout Workbook
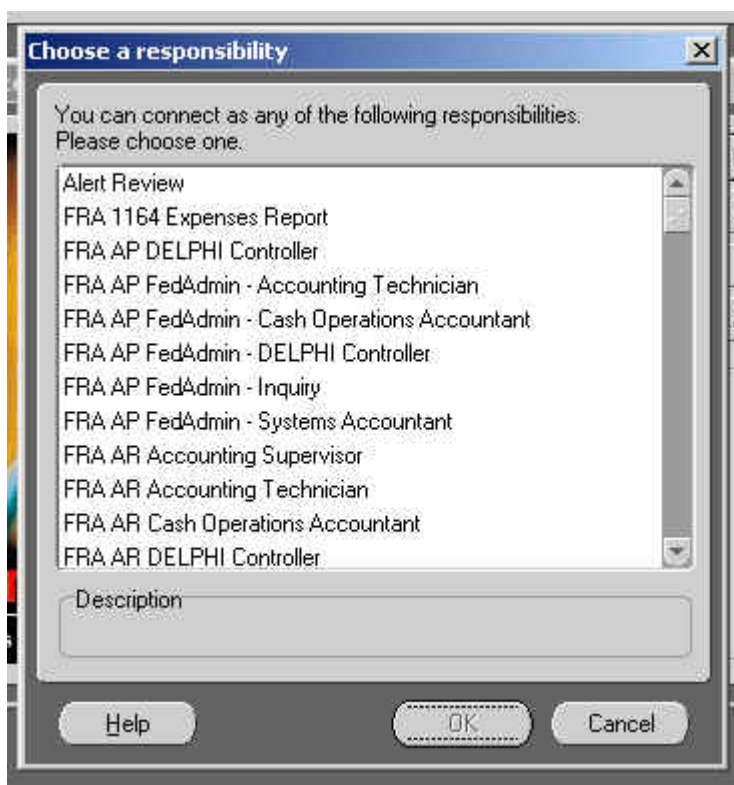
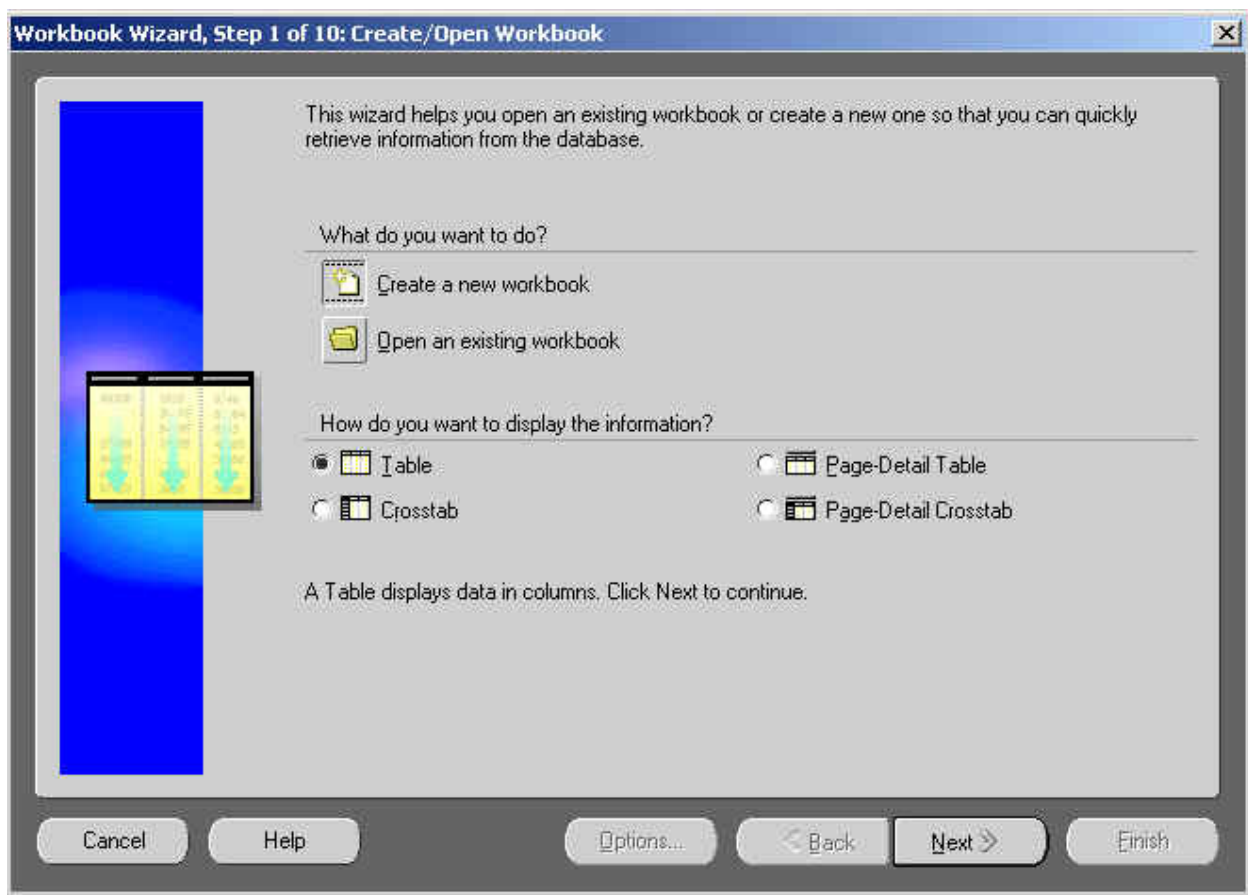| |
|---|
| Oracle Discoverer |
| N → Create/Open Workbook |
| Connect to Oracle Discoverer |

1. In the Connect to Oracle Discoverer window, enter the requested information.

Using Discoverer 4i Web

2. Select a responsibility.

Using Discoverer 4i Web

3. Select this icon to create a new workbook.

4. Once this has been selected you will be prompted to select a report layout type.

Using Discoverer 4i Web

5. A Page-Detail Table Workbook displays data in columns grouped by the items in the page axis.

6. Select Next to continue on to Step 2 of the Workbook Wizard.

Using Discoverer 4i Web

7. Under the Available area select the desired business areas.

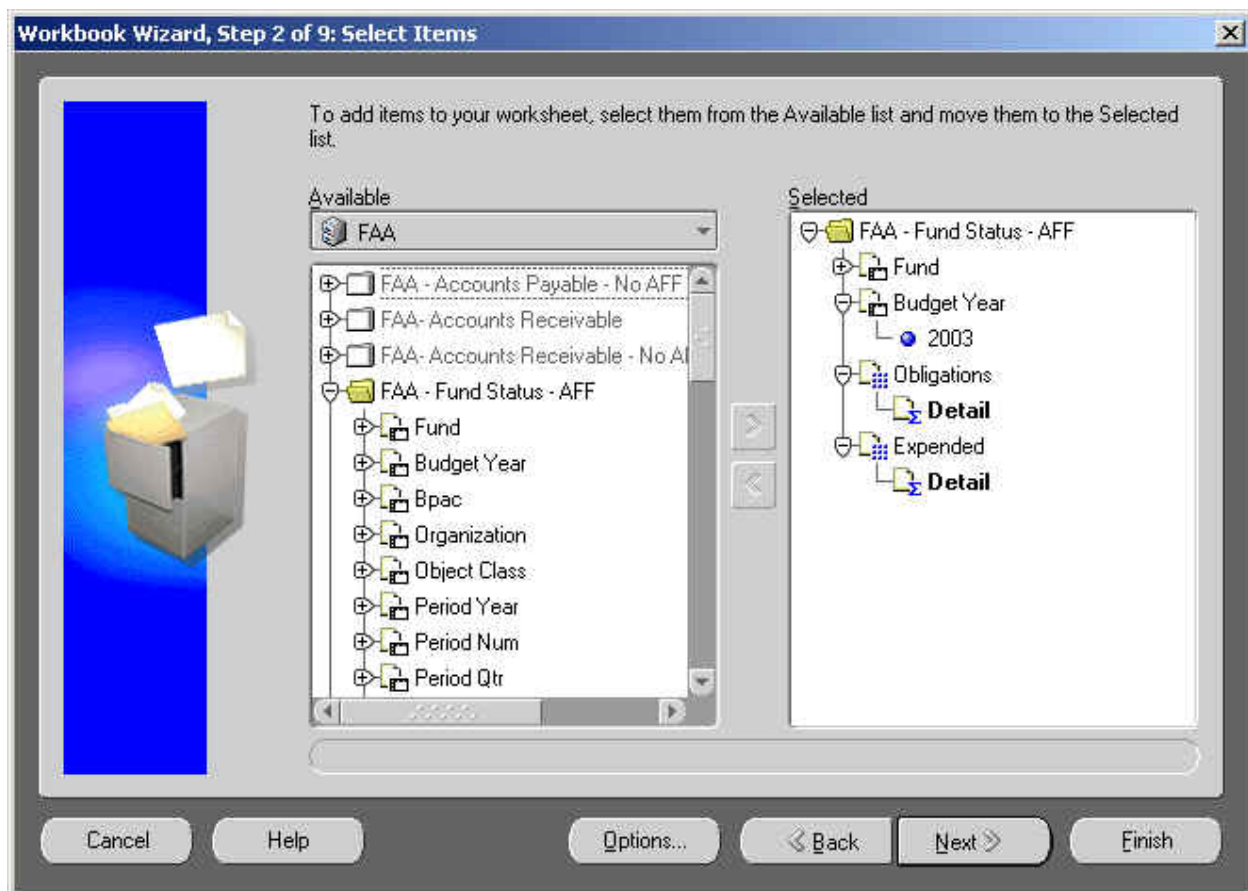8. Select and drag the desired item(s) from the Available List of Values to the Selected Area or select the desired item(s) from the Available List of Values and select the → arrow key to move them over to the Selected area.

9. Select Next to continue on to Step 3 of the Workbook Wizard.
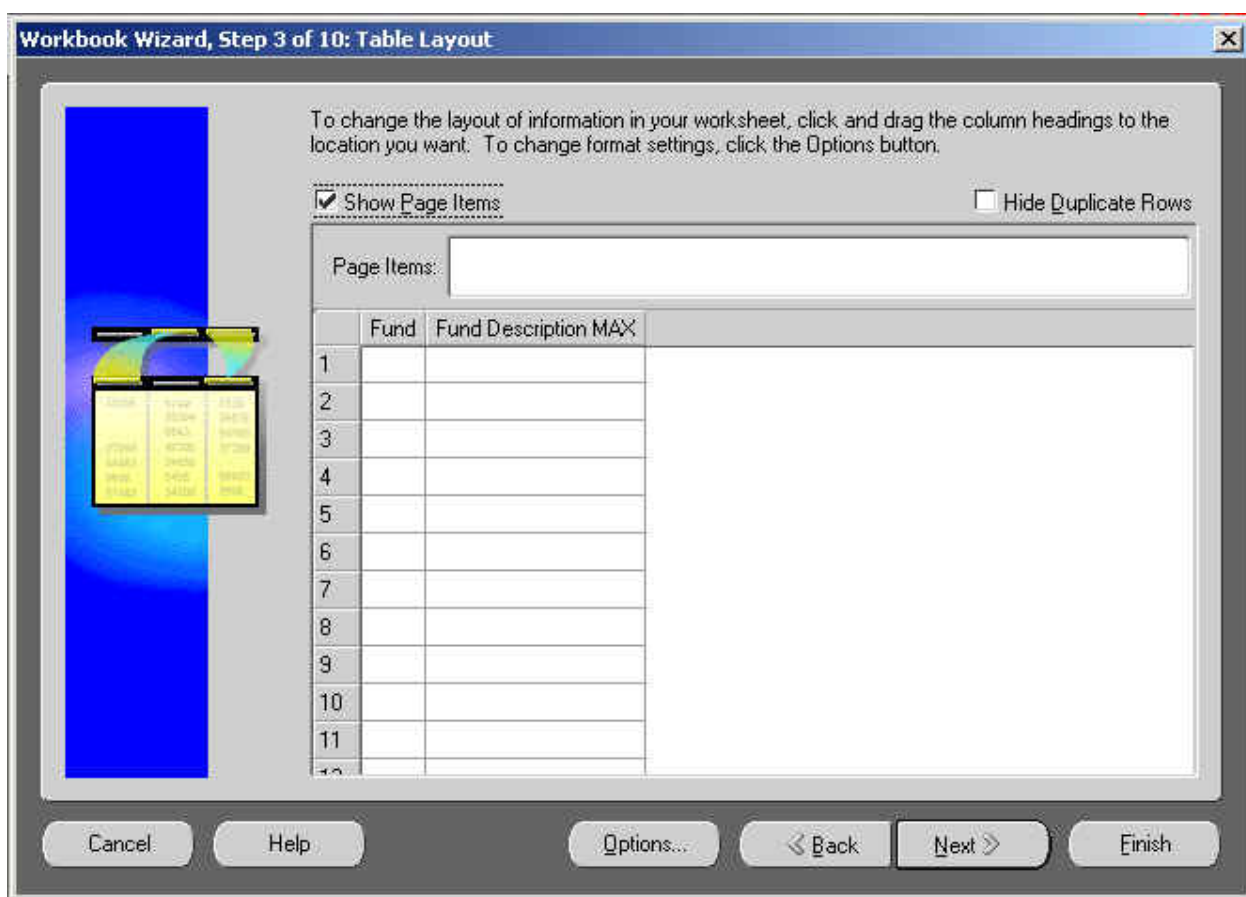
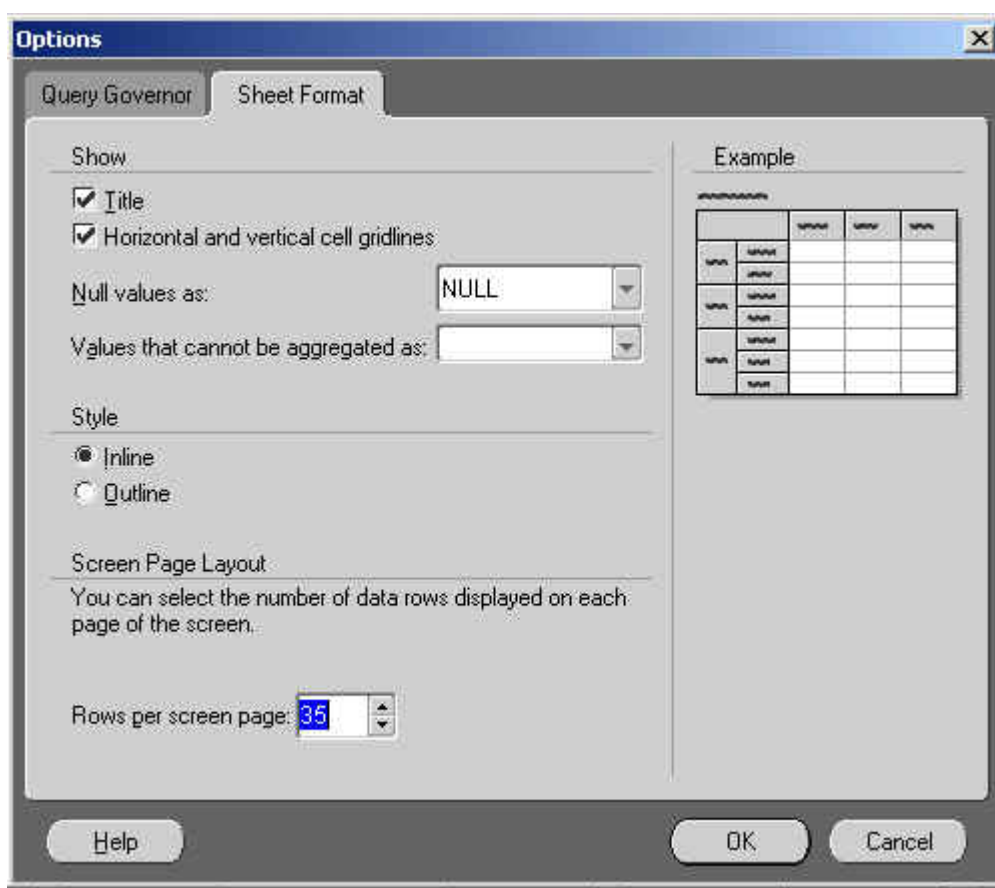10. To change the layout of information in your worksheet, click and drag the row and column headings to the location you want.
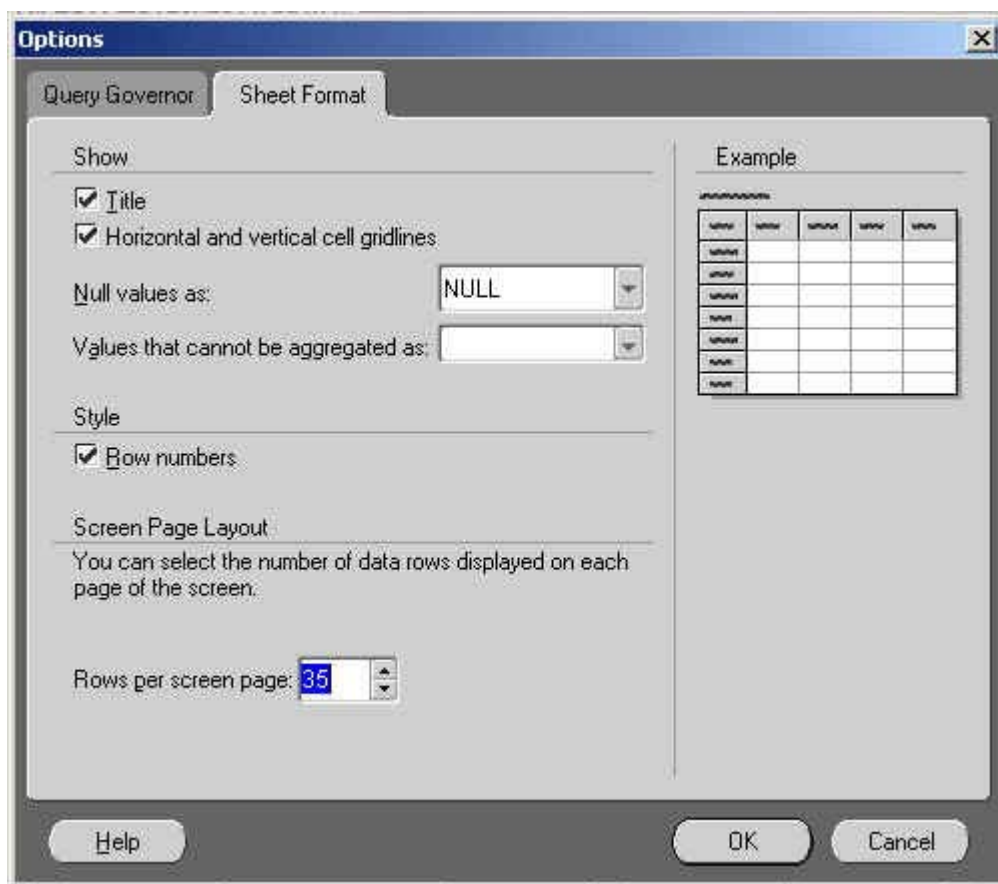
11. Make changes to the format setting by selecting the (B) Options.

OPTIONS		
Field Name	**Comments**	**Required?**
Show Area		
Title	Select to view or not to view the title on the header of the workbook.	Yes
Horizontal and Vertical Cell Gridlines	Select to view your workbook displayed with or without gridlines.	Yes
Null Values As	You can choose your Null Values to be displayed as Null-blank, -, N/A or 0.	Yes
Values That Cannot Be Aggregated As	Can be displayed as Null-blank, -, N/A or 0.	Yes
Style Area		
Row Numbers	You can check this field to display your workbook with row numbers.	Yes
Screen Page Layout Area		
Rows Per Screen Page	Select how many rows you would like to see displayed on your worksheet.	Yes

12. Select Next to continue to Step 4 of the Workbook Wizard.

Using Discoverer 4i Web

13. You can apply formats to the item(s) in the list of values.

14. Options are available to format the data, format the heading or edit the heading. You can change the number, font size, font color etc.

15. After changes have been made select Next to continue to Step 5 of the Workbook Wizard.

Using Discoverer 4i Web

Workbook Wizard, Step 5 of 10: Conditions

Define conditions to limit worksheet results by criteria you specify. Click New to define a new condition.

View conditions for: All Items

☑ 🔻 Fund IN ('1230100000','1230100005','1230100007','1230100008','1...

New...
Edit...
Delete

Description
Fund IN
('1230100000','1230100005','1230100007','1230100008','1230100009','12301 00800','1230100900','1234100000','1238000000','1238100000','12382A0000','

Cancel   Help   Options...   Back   Next   Finish

16. You can apply or edit conditions to a given area in the list of values. Such as, add a range for Fund Values.

Using Discoverer 4i Web

17. After changes have been made select Next to continue to Step 6 of the Workbook Wizard.
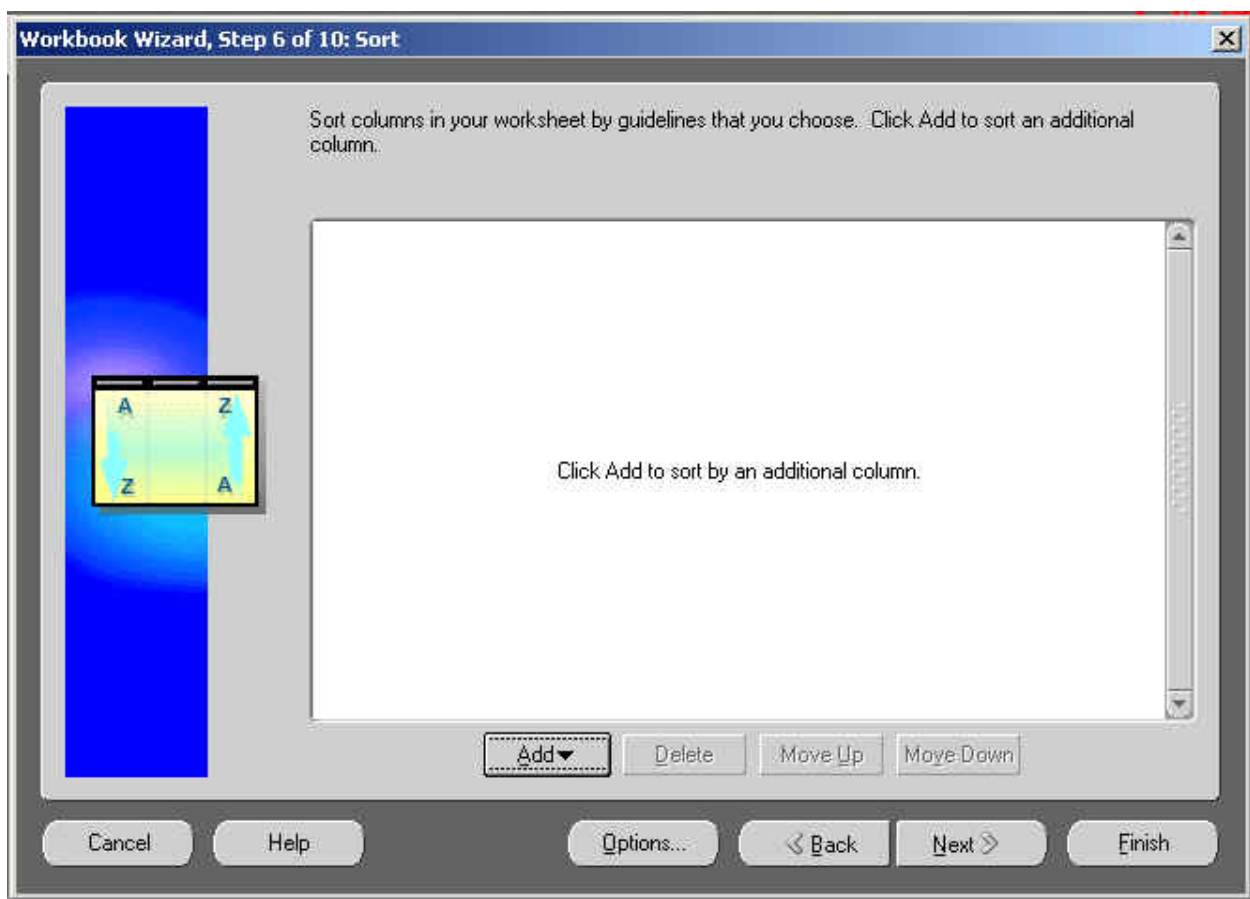
18. Sort columns in your workbook using guidelines you create.

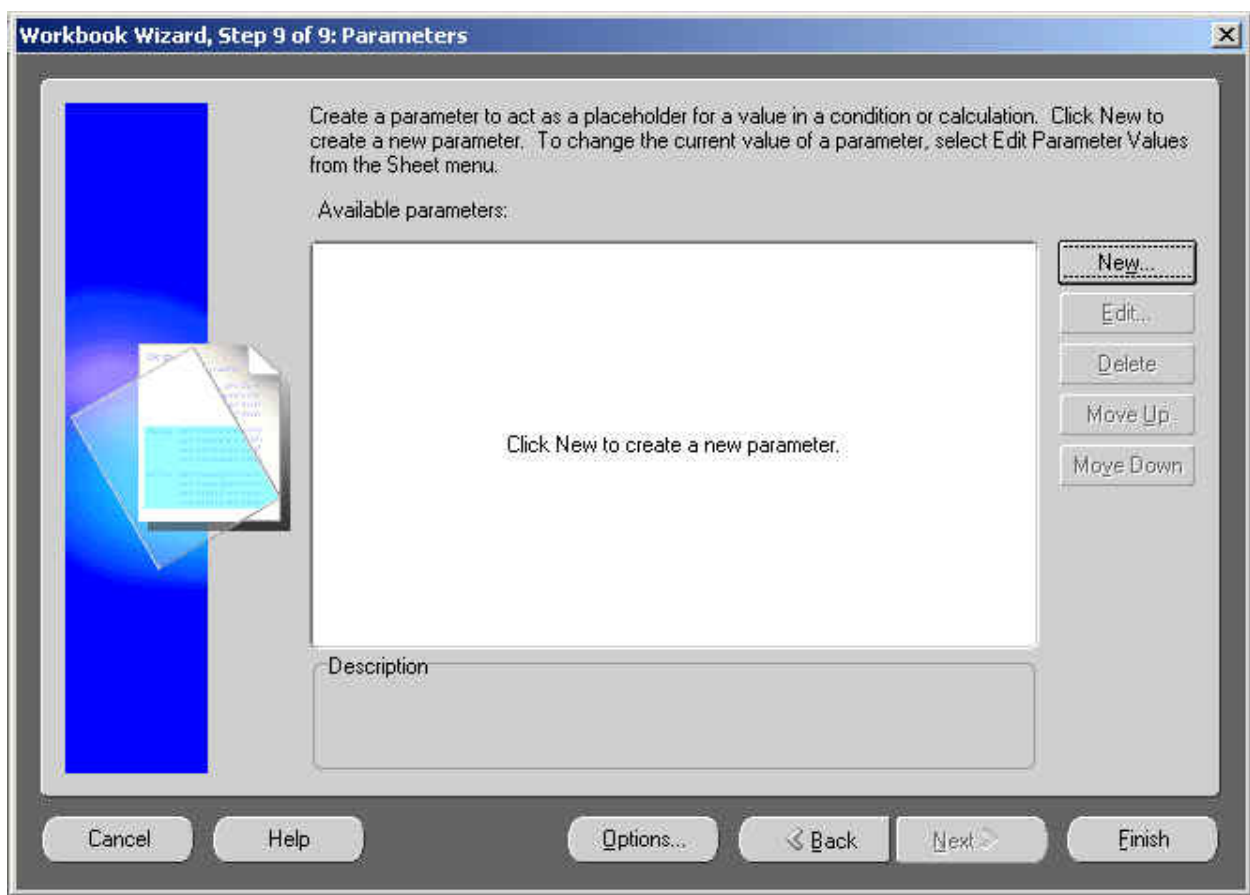19. After changes have been made select Next to continue to Step 7 of the Workbook Wizard.
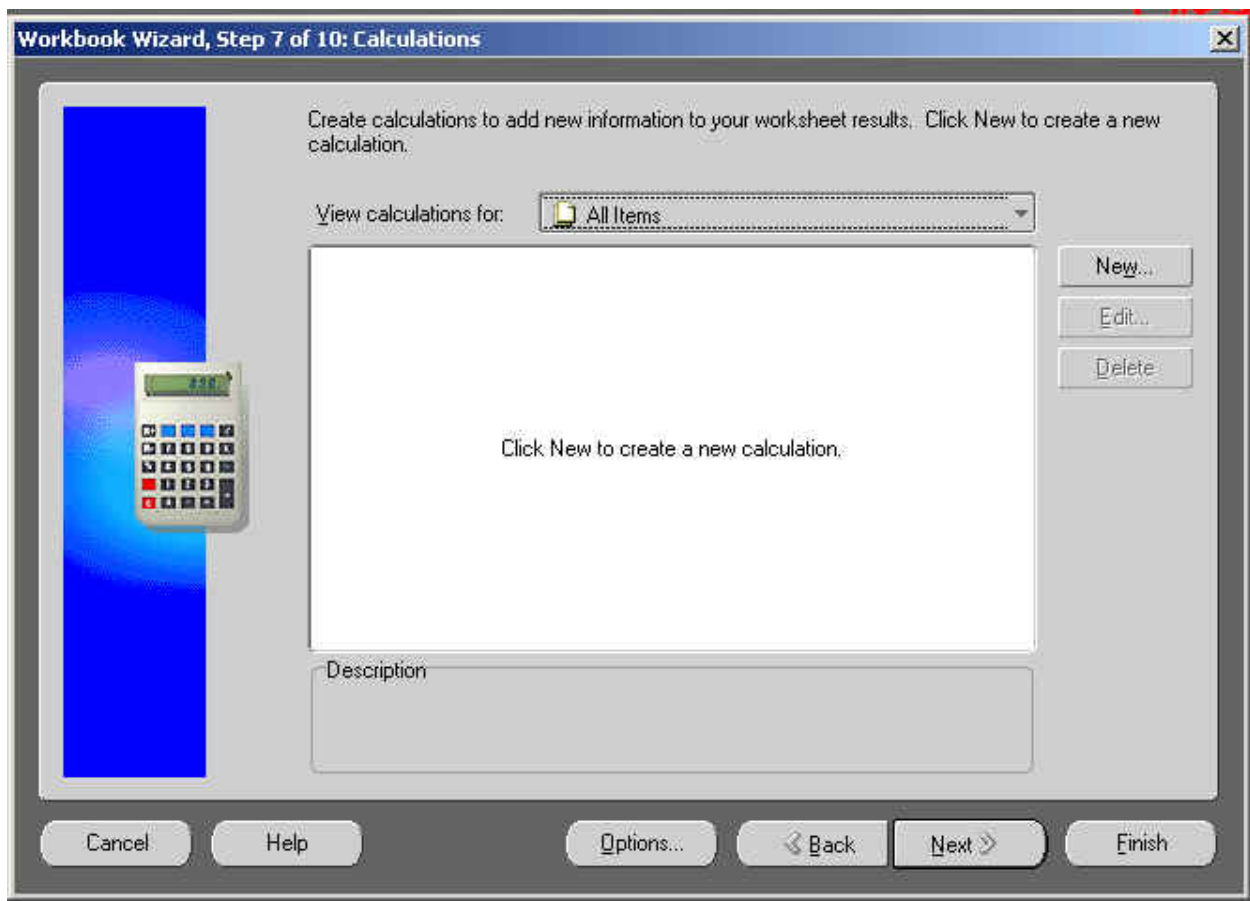
20. Create calculations to add new information to your workbook results.

21. After changes have been made select Next to continue to Step 8 of the Workbook Wizard.

Using Discoverer 4i Web

Workbook Wizard, Step 8 of 10: Percentages

You can create a percentage based on any data point to further analyze your data. Click New to create a new percentage.

View percentages for: All Items

Click New to create a new percentage.

New...
Edit...
Delete

Description

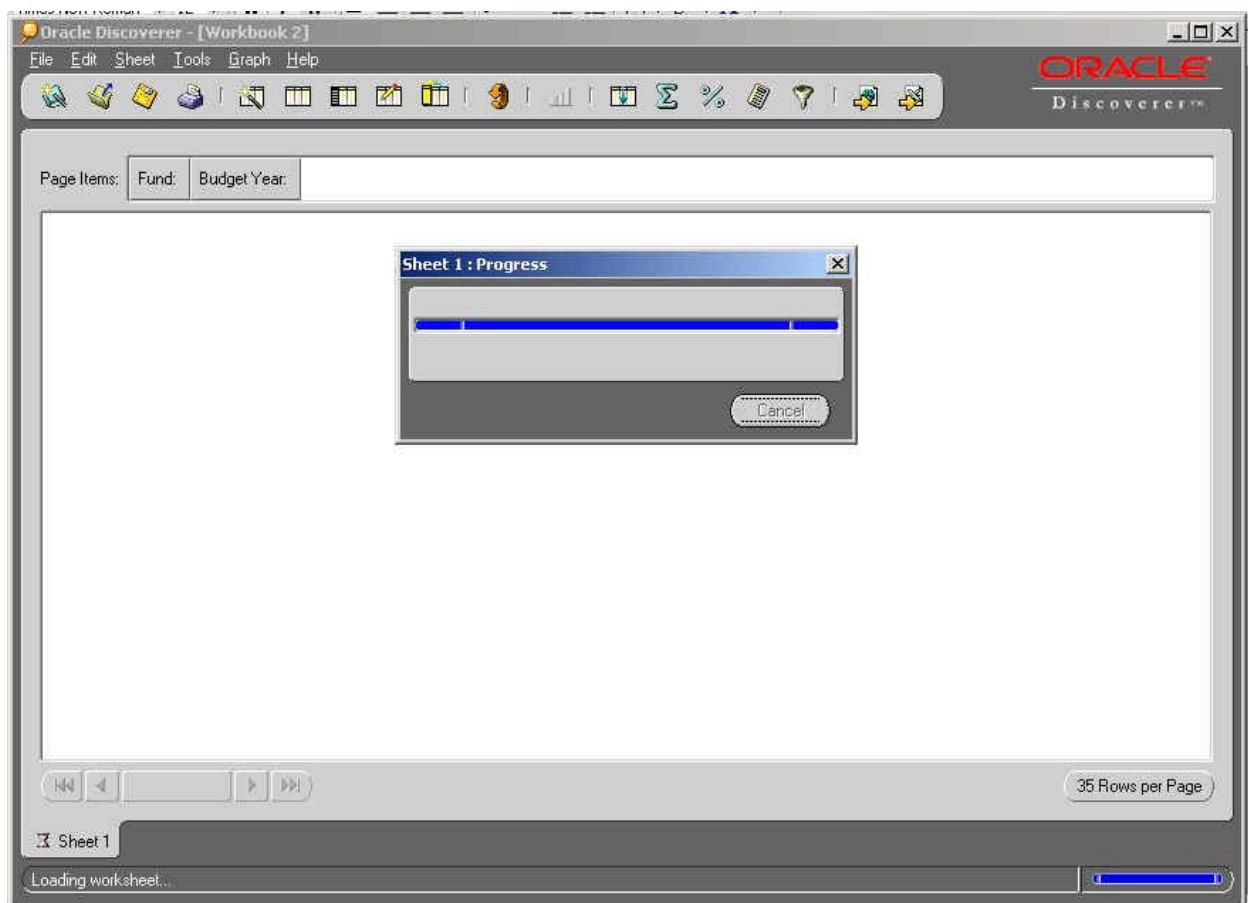Cancel   Help   Options...   Back   Next   Finish
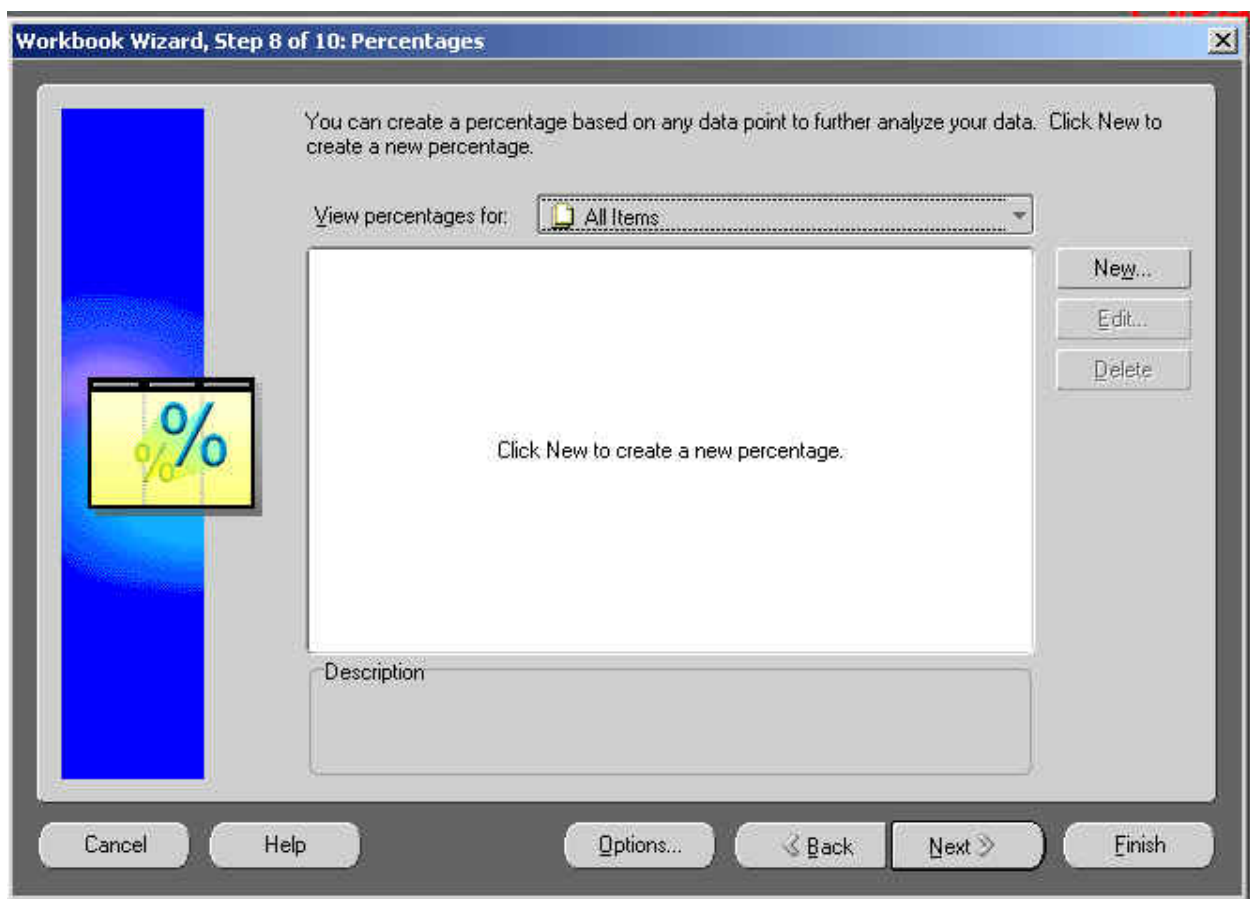
22. You can create a percentage based on any data point to further analyze your data.

23. After changes have been made select Next to continue to Step 9 of the Workbook Wizard.

Using Discoverer 4i Web
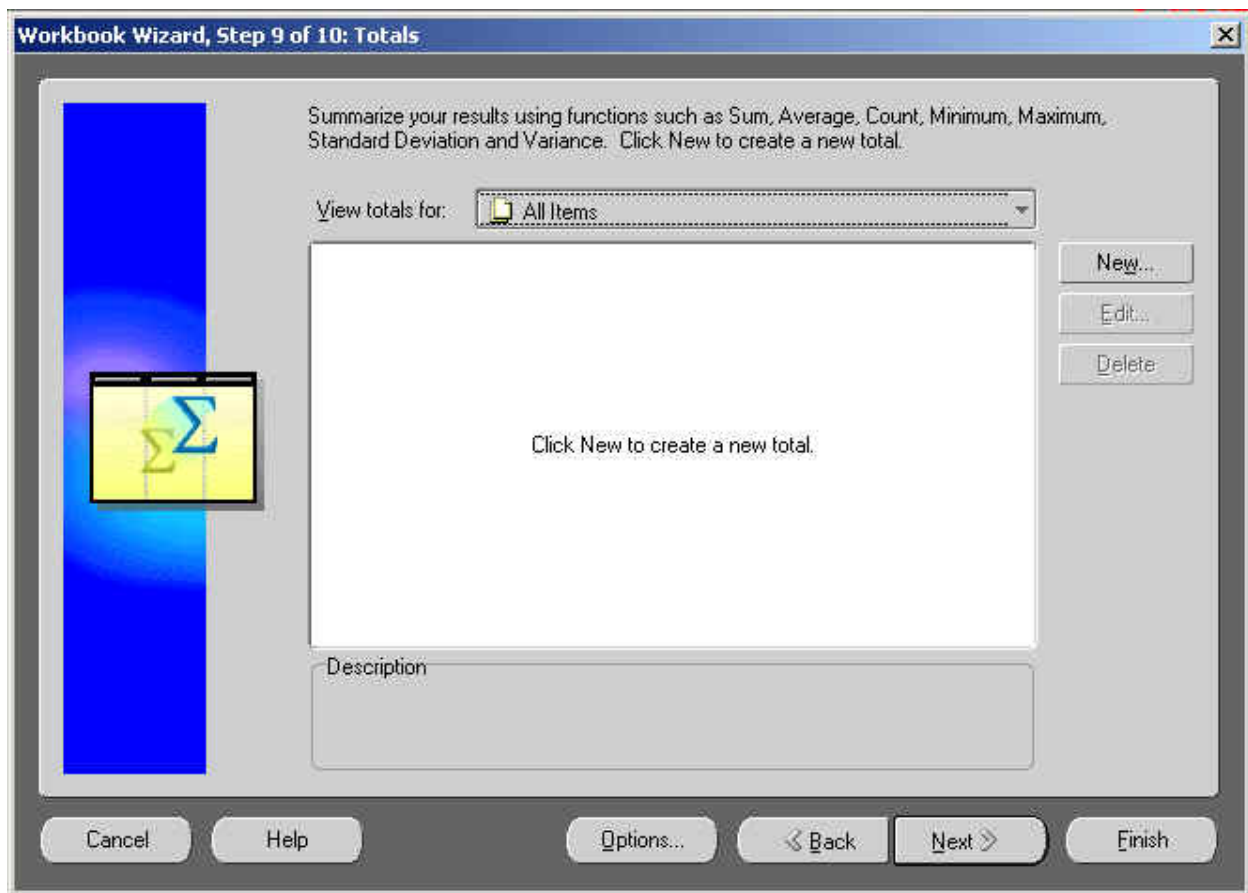
24. Summarize your results using functions such as Sum, Average, Count, Min or Max.

25. After changes have been made select Next to continue to Step 10 of the Workbook Wizard.
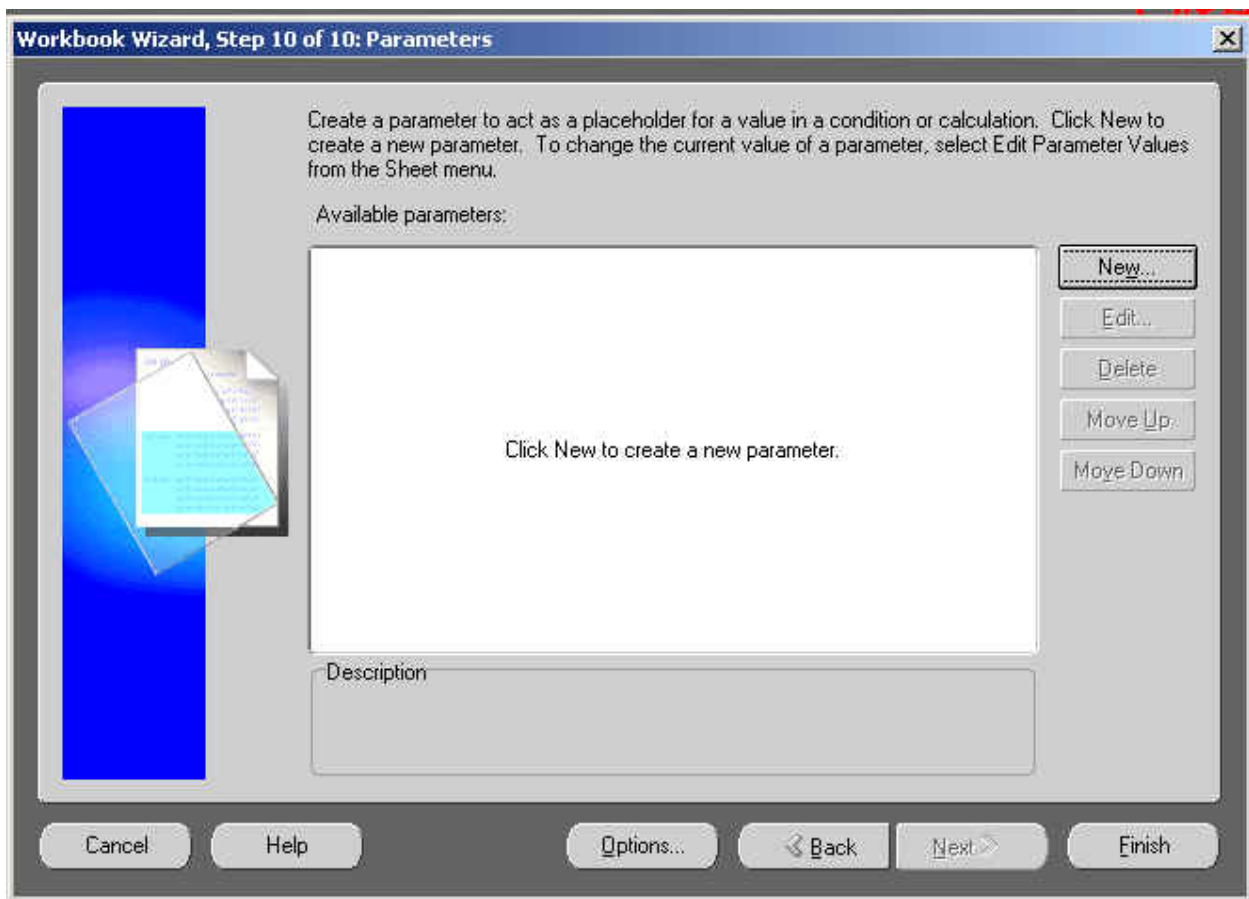
26. Create a Parameter to act as a placeholder for a value in a condition or calculation.

27. After changes have been made select Finish to display your finalized workbook.

28. You will receive an informational box that gives you an estimated time of completion.
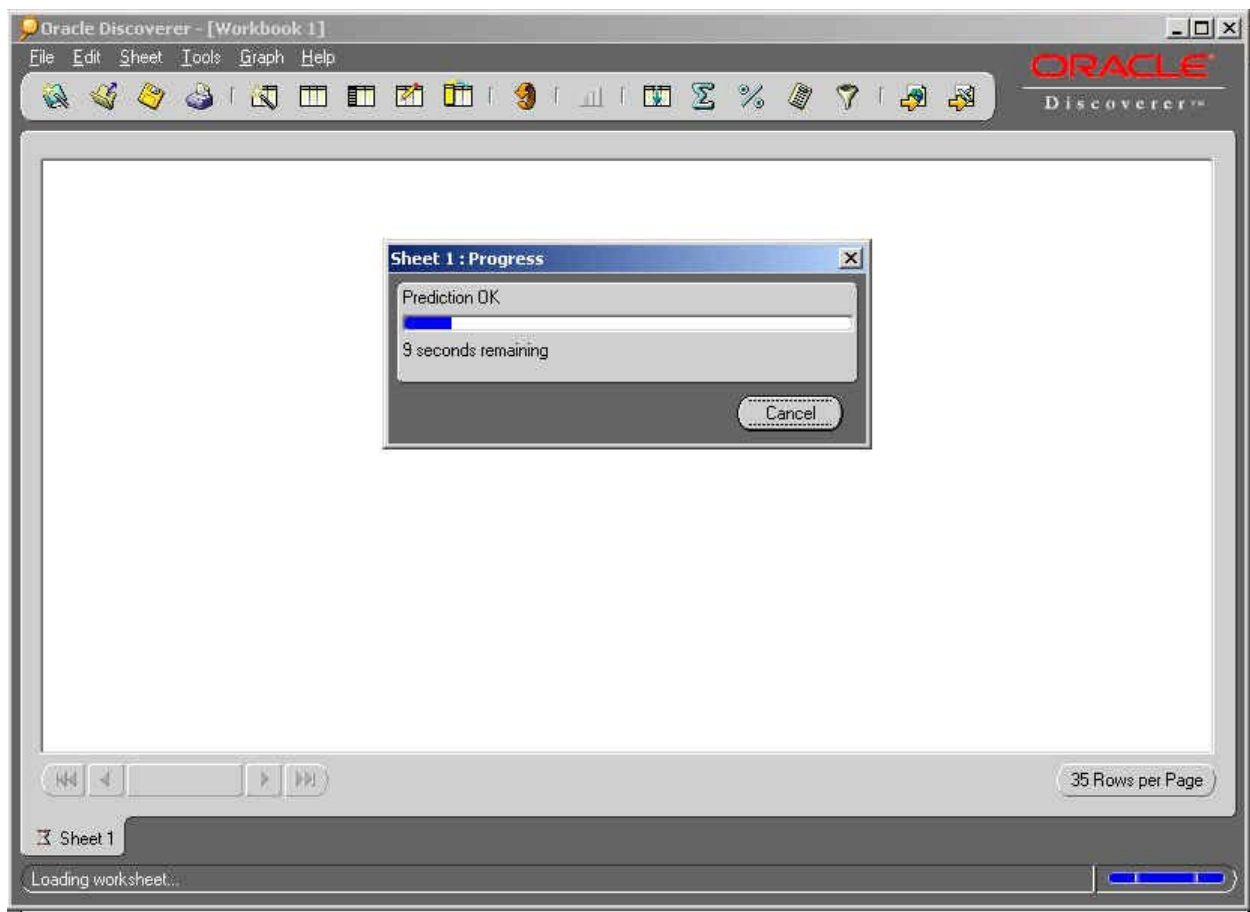
29. Once the program has received all information your workbook is then displayed.

Using Discover 4i Web

Oracle Discoverer - [Workbook 1]

File Edit Sheet Tools Graph Help

ORACLE
Discoverer™

	Fund	Fund Description MAX
1	1230100000	FY2003, OPS, GENERAL FUND
2	1230100005	FY2003, OPS, FEMA EMERGENCY ASSISTANCE,
3	1230100007	FY2003, OPS, AIRCRAFT CERTIFICATION, NATIONAL
4	1230100008	FY2003, OPS, DEPUTY ADMINISTRATOR, NATIONAL
5	1230100009	FY2003, OPS, DEPUTY ADMINISTRATOR, NATIONAL
6	1230100800	PAYROLL VALUES
7	1230100900	PAYROLL VALUES
8	1234100000	FY2003 OPS IMPREST FUND
9	1238000000	FY2003, OPS, AIRPORT AND AIRWAY TRUST FUND
10	1238100000	FY2003, AIP, GRANTS-IN-AID FOR AIRPORTS, AATF
11	12382A0000	FY2001/2003, F&E, OTHER ACTIVITIES, NATIONAL
12	12382W0000	FY2003, FACILITIES & EQUIPMENT, PCB&T, AIRPORT & AIRWAY TRUST FUND
13	1238300000	FY2002/2003, OPS, AATF, NATIONAL
14	1238800000	FY2001/2003, RE&D, AATF, NATIONAL
15	12388A0000	FY2002/2003, RE&D, AATF
16	12482A0000	FY2002/2004, F&E, OTHER ACTIVITIES, NATIONAL
17	12482R0008	FY2002/2004, F&E, REGIONAL ADMIN, REIMB, NATIONAL
18	12482R0009	FY2002/2004, F&E, REGIONAL ADMINISTRATOR, REIMB, NATI

Page 1 of 1   35 Rows per Page

Sheet 1

Using Discoverer 4i Web

Creating a Page-Detail Crosstab Workbook

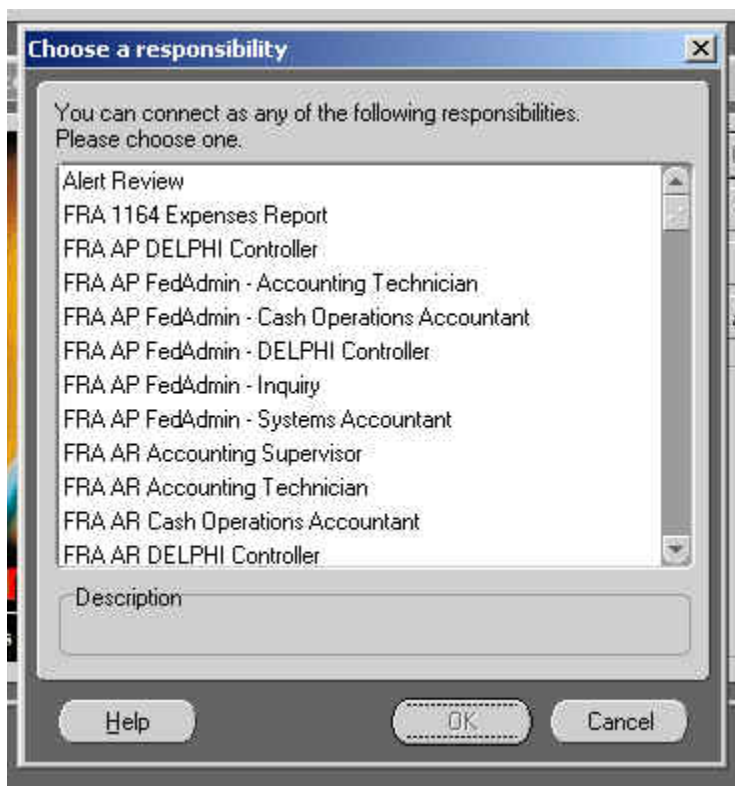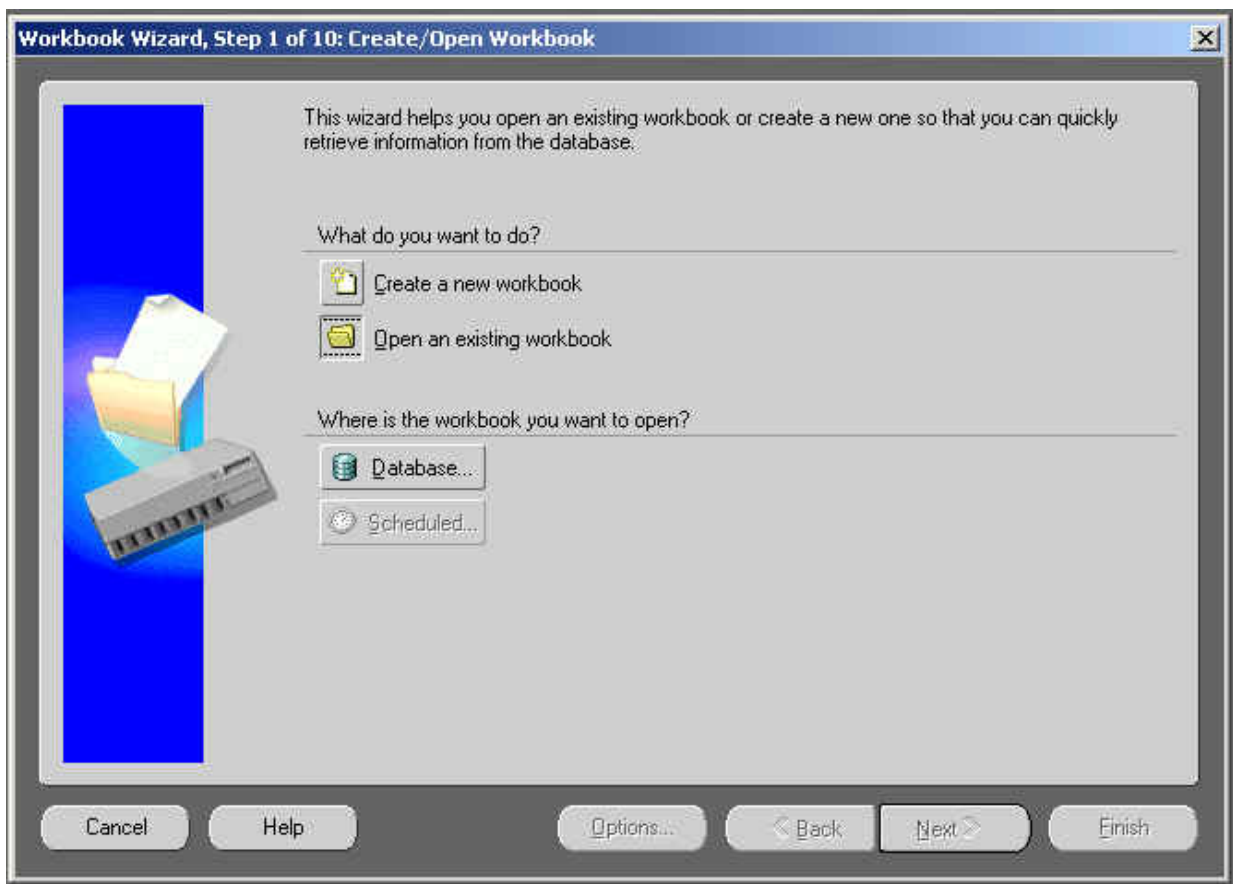Oracle Discoverer

N →Create/Open Workbook

Connect to Oracle Discoverer

1. In the Connect to Oracle Discoverer window, enter the requested information.

2.   Select a responsibility.

3.   Select this icon to create a new workbook.

4. Once this has been selected you will be prompted to select a report layout type.

Using Discoverer 4i Web

Workbook Wizard, Step 1 of 10: Create Workbook

This wizard helps you create a new worksheet in this workbook so that you can quickly retrieve information from the database.

How do you want to display the information?

- ○ Table
- ○ Crosstab
- ○ Page-Detail Table
- ● Page-Detail Crosstab

A Page-Detail Crosstab displays information in both rows and columns grouped by the items in the page axis. You can also pivot items along the top and side axes. Click Next to continue.

Cancel   Help   Options...   Back   Next   Finish
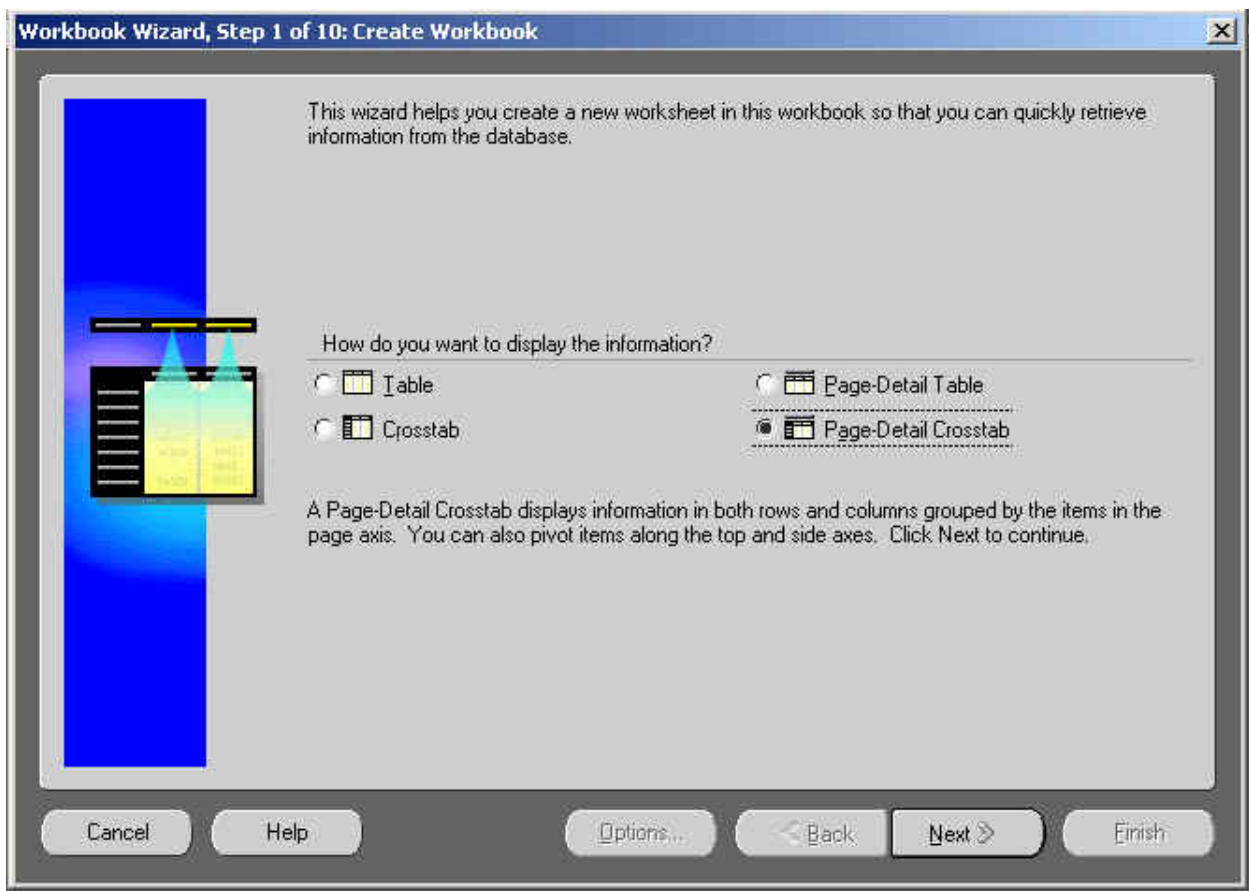
5. A Page-Detail Crosstab workbook displays information in both rows and columns grouped by the items in the page axis.

6. Select Next to continue on to Step 2 of the Workbook Wizard.

Using Discoverer 4i Web

7. Under the Available area select the desired business areas.

8. Select and drag the desired item(s) from the Available List of Values to the Selected Area or select the desired item(s) from the Available List of Values and select the > arrow key to move them over to the Selected area.

9. Select Next to continue on to Step 3 of the Workbook Wizard.

10. To change the layout of information in your worksheet, select and drag the row and column headings to the location you want.

Using Discoverer 4i Web

11. Make changes to the format by selecting the (B) Options.

OPTIONS		
Field Name	**Comments**	**Required?**
Show Area		
Title	Select to view or not to view the title on the header of the workbook.	Yes
Horizontal and Vertical Cell Gridlines	Select to view your workbook displayed with or without gridlines.	Yes
Null Values As	You can choose your Null Values to be displayed as Null-blank, -, N/A or 0.	Yes
Values That Cannot Be Aggregated As	Can be displayed as Null-blank, -, N/A or 0.	Yes
Style Area		
Inline	The inline view provides for an additional column on the far left of the workbook	Yes
Outline	The outline view provided for just one main column on the far left of the workbook.	Yes
Screen Page Layout Area		
Rows Per Screen Page	Select how many rows you would like to see displayed on your worksheet.	Yes

12. Select Next to continue to Step 4 of the Workbook Wizard.

Using Discoverer 4i Web

13. You can apply formats to the item(s) in the list of values.

14. Options are available to format the data, format the heading or edit the heading. You can change the number, font size, font color etc.

15. After changes have been made select Next to continue to Step 5 of the Workbook Wizard.

Using Discoverer 4i Web

Workbook Wizard, Step 5 of 9: Conditions

Define conditions to limit worksheet results by criteria you specify. Click New to define a new condition.

View conditions for: [ ] All Items

☑ ▼ Budget Year IN ('2003')
☑ ▼ Fund IN ('1230100000','1230100005','1230100007','1230100008','1...

New...
Edit...
Delete

Description
Budget Year IN ('2003')

Cancel   Help   Options...   « Back   Next »   Finish
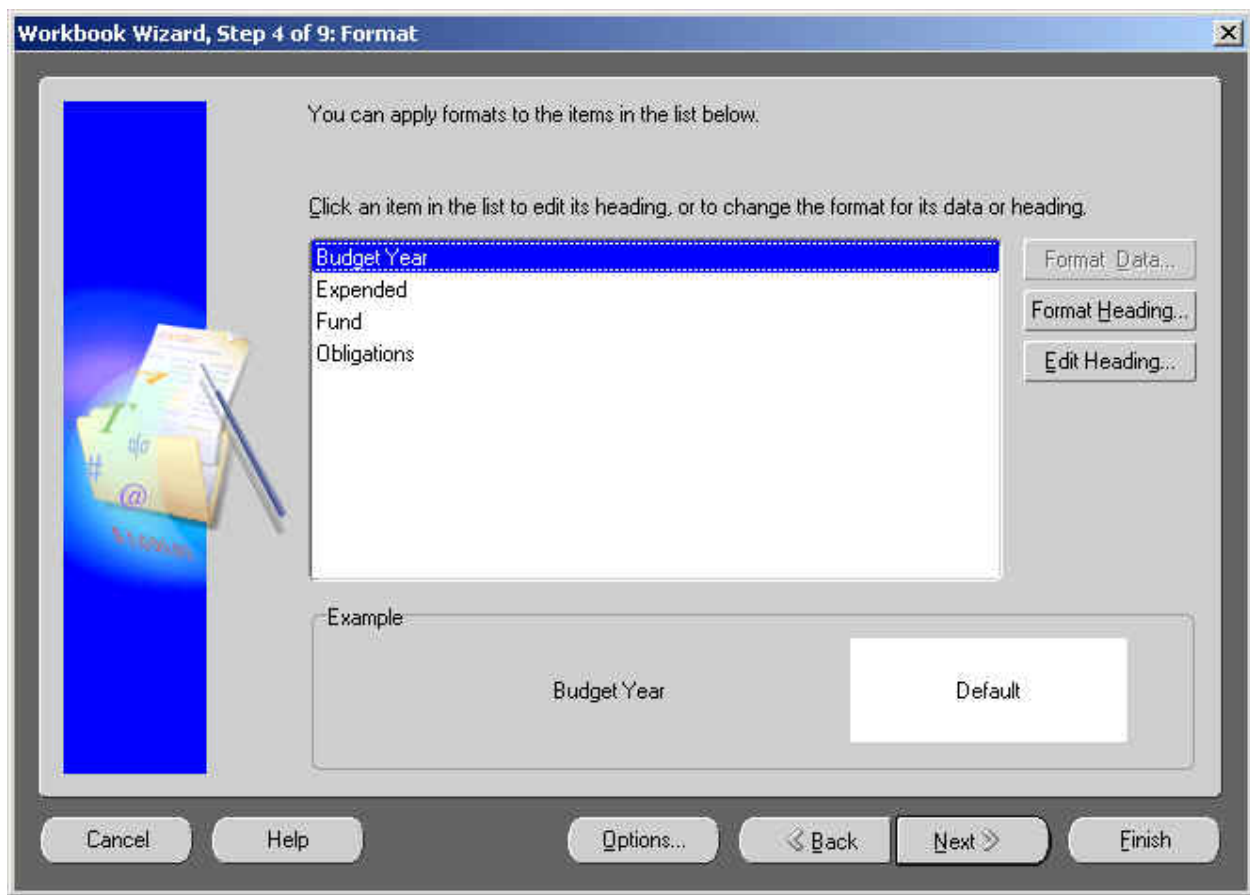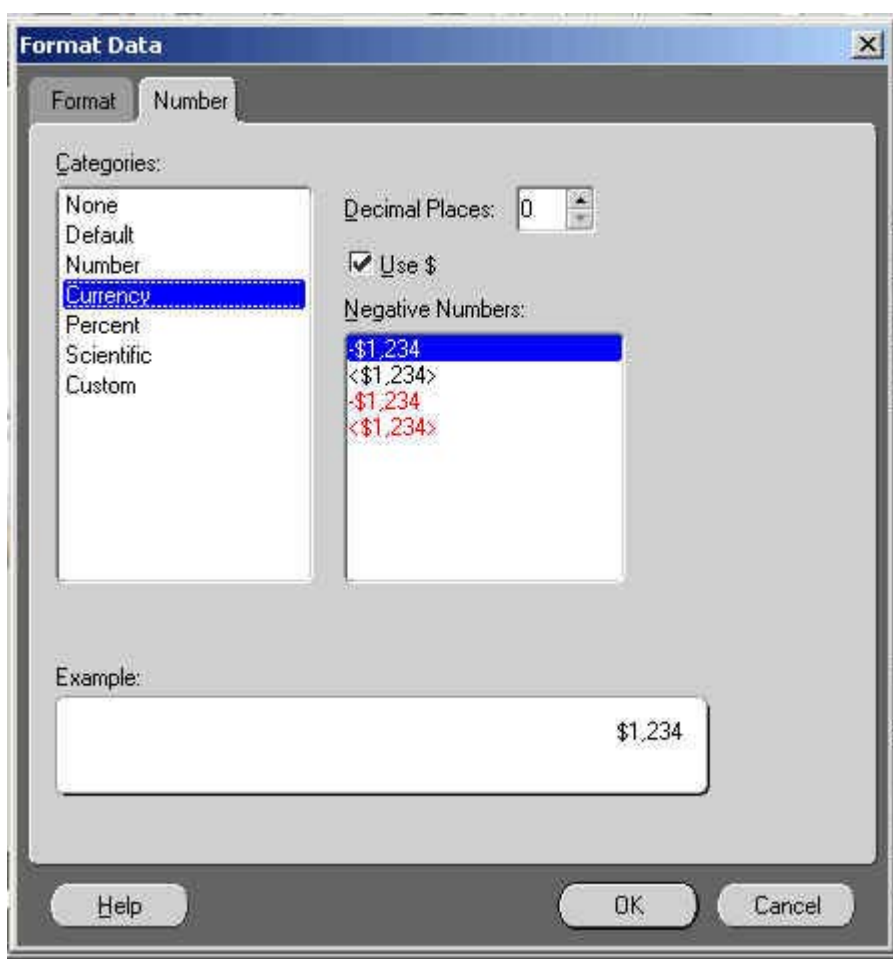
16. You can apply or edit conditions to a given area in the list of values. Such as, add a range for Budget Year.
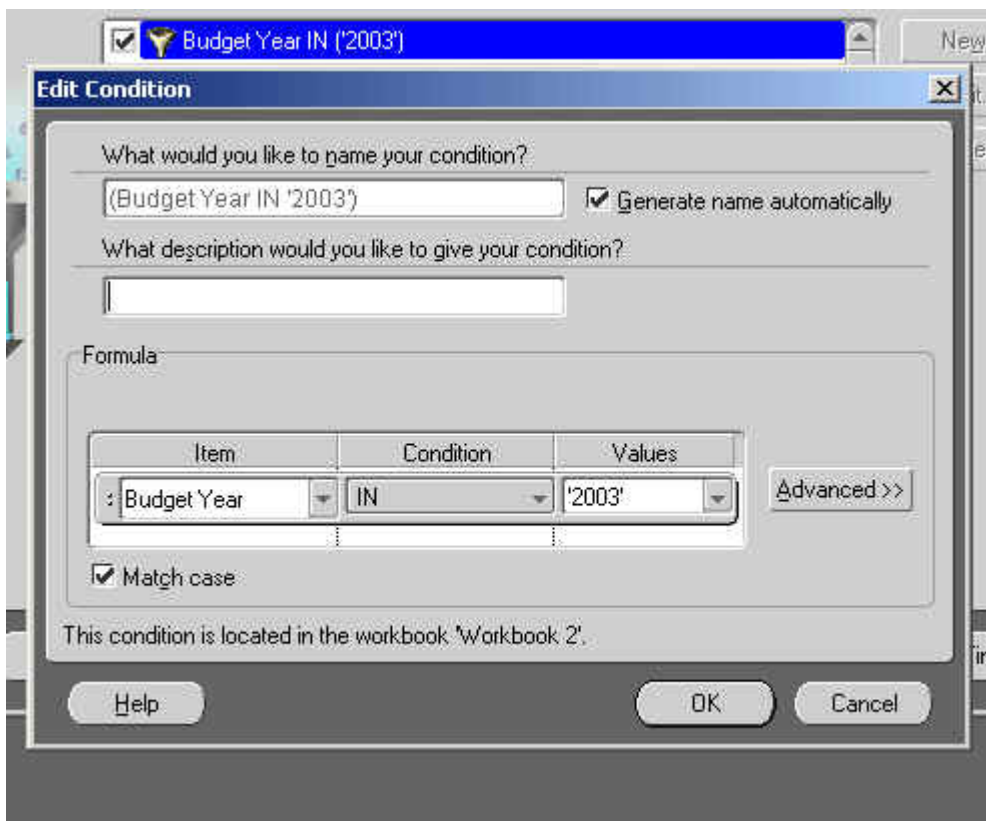
17. After changes have been made select Next to continue to Step 6 of the Workbook Wizard.

Using Discoverer 4i Web
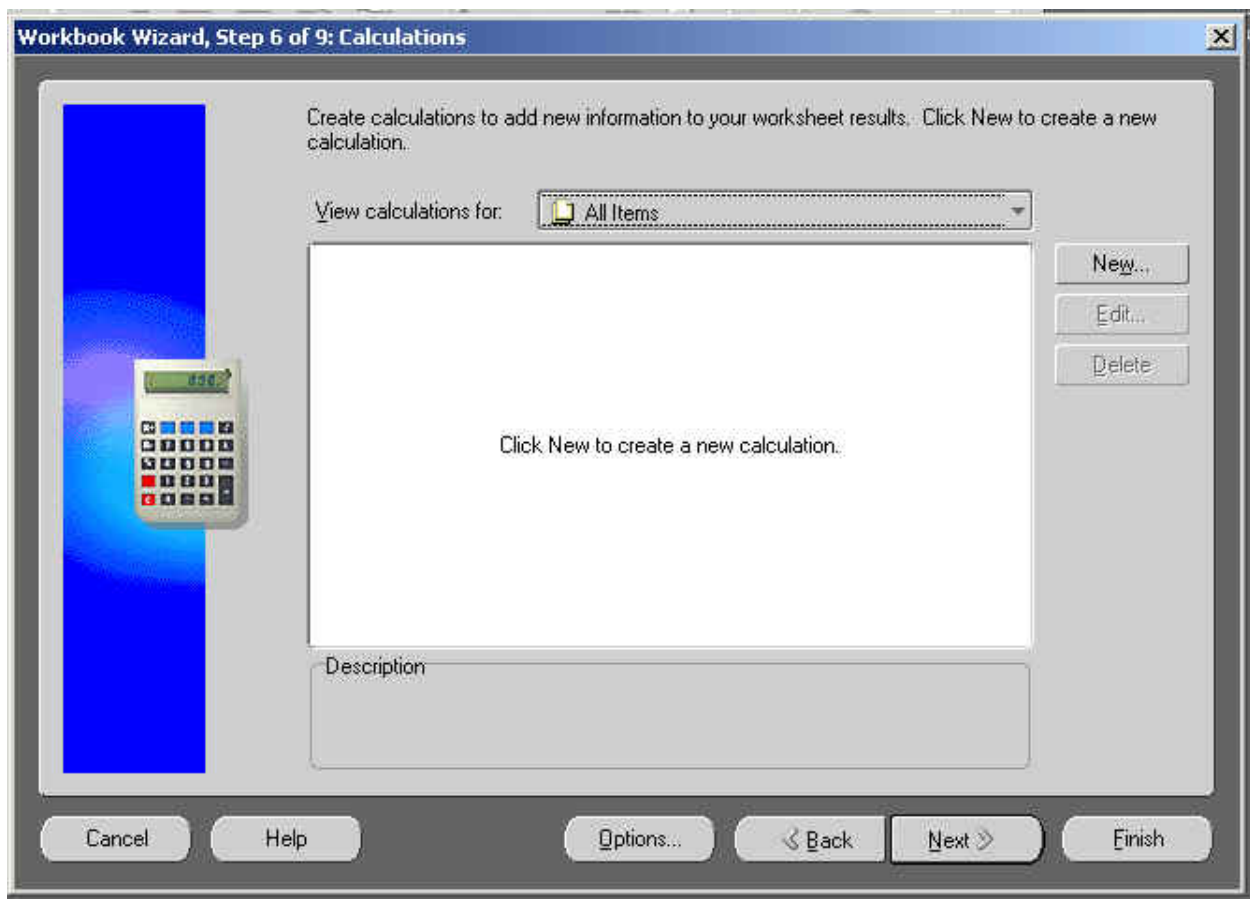
18. Create calculations to add new information to your workbook results.

19. After changes have been made select Next to continue to Step 7 of the workbook Wizard.
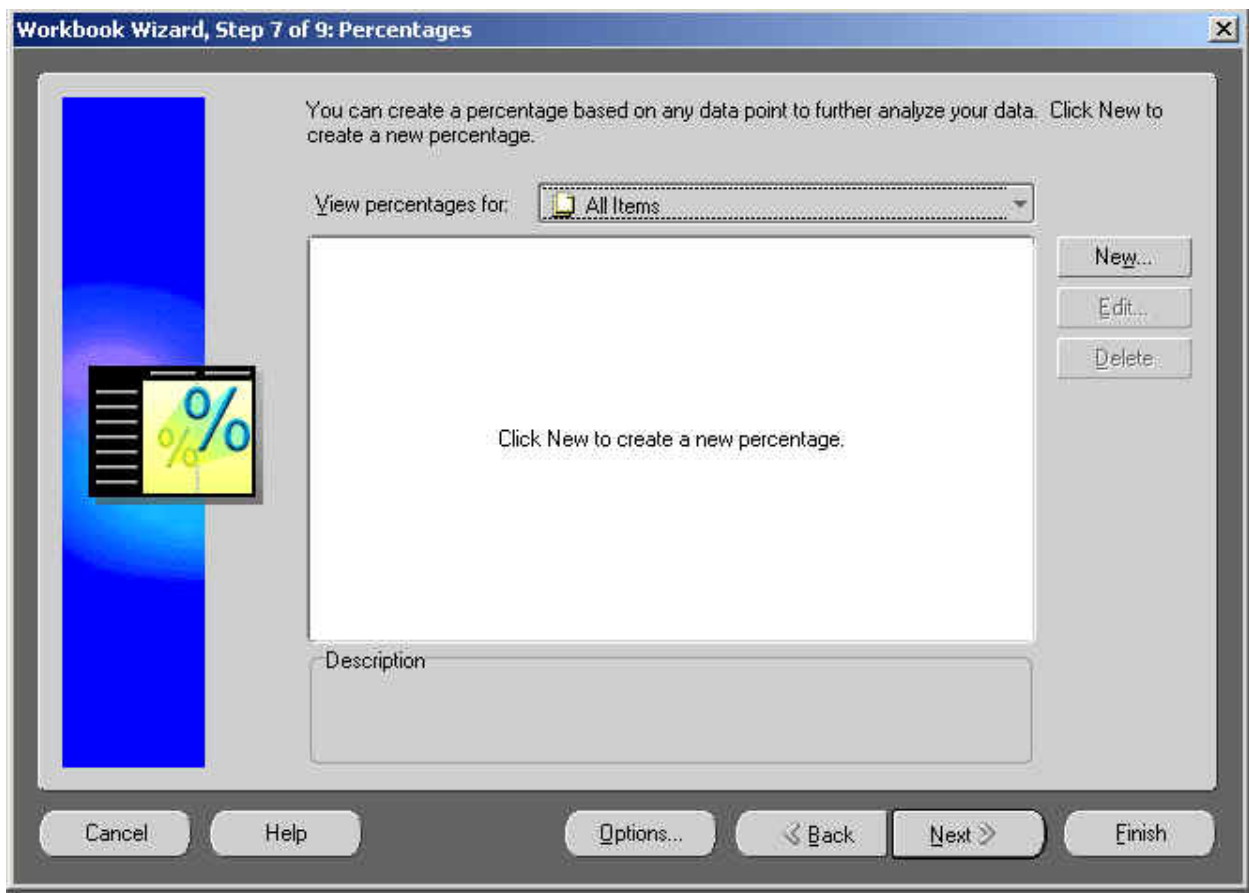
20. You can create a percentage based on any data point to further analyze your data.

21. After changes have been made select Next to continue to Step 8 of the Workbook Wizard.
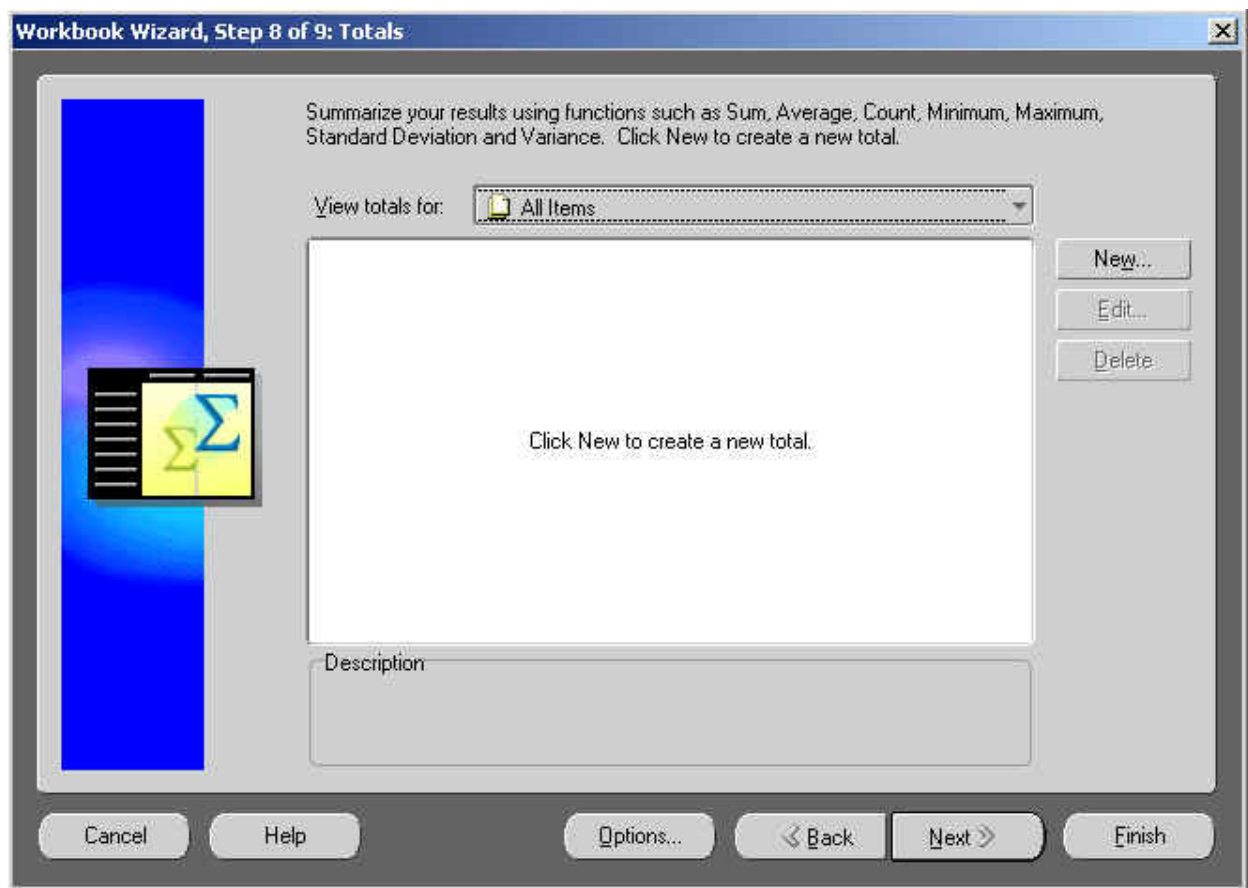
22. Summarize your results using functions such as Sum, Average, Min and Max to create workbook totals.

23. After changes have been made select Next to continue to continue to Step 9 of the Workbook Wizard.

Create a parameter to act as a placeholder for a value in a condition or calculation. Click New to create a new parameter. To change the current value of a parameter, select Edit Parameter Values from the Sheet menu.

Available parameters:

Click New to create a new parameter.

New...

Edit...

Delete

Move Up

Move Down

Description

Cancel   Help   Options...   « Back   Next »   Finish

24. Create a Parameer to act as a placeholder for a value in a condition or calculation.

25. After changes have been made select Finish to display your workbook.

26. Yo will receive an informational box that gives you an estimated time of completion.

27. Once the program has received all information your workbook is then displayed.

Using Discoverer 4i Web

Note: You must always have a data element in the white area on a detail Crosstab workbook in order for data to be retrieved. See below.
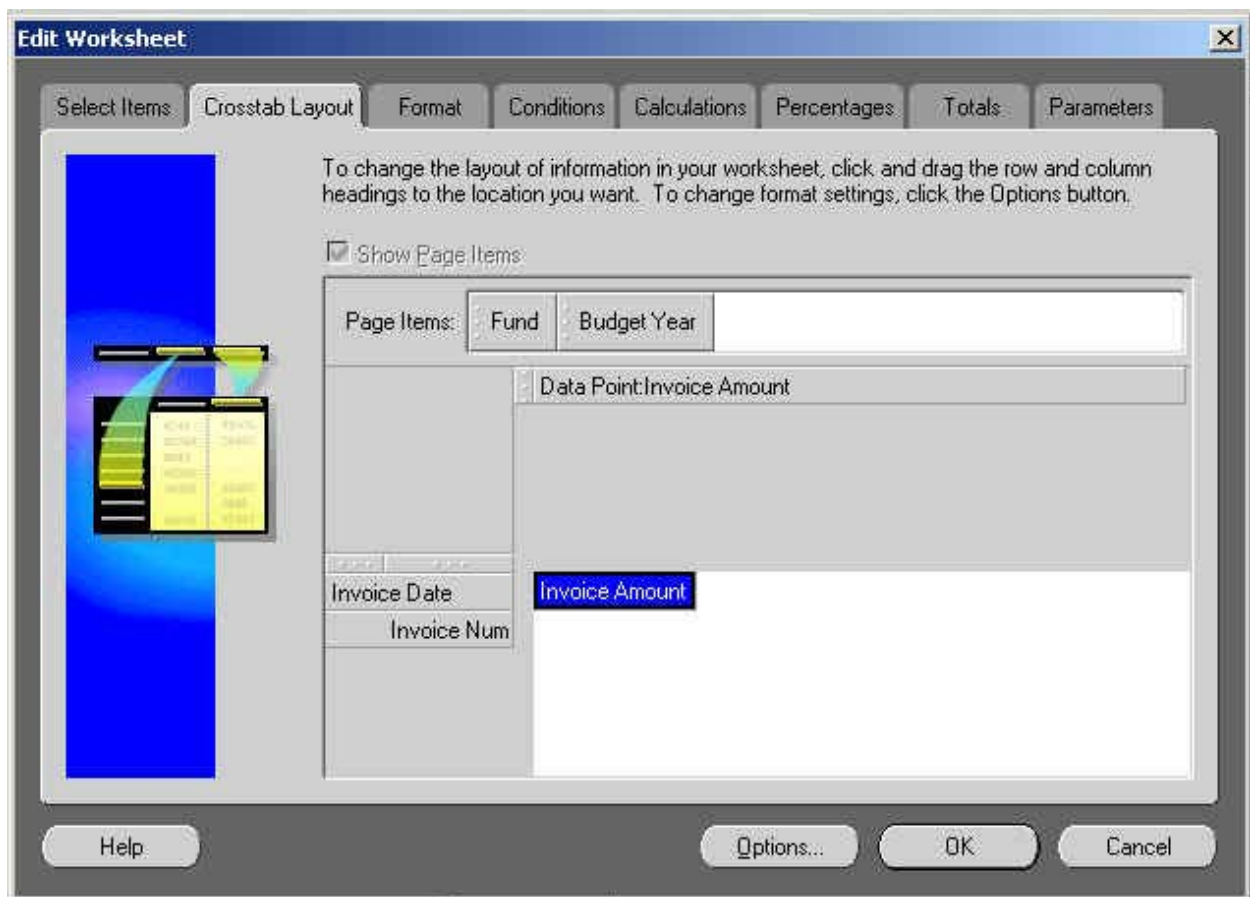
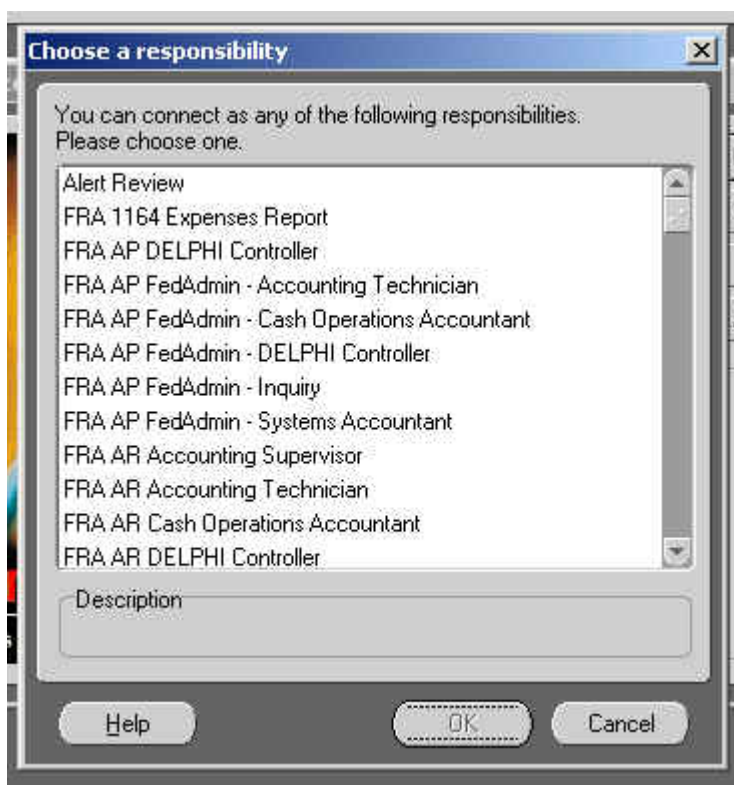Using Discoverer 4i Web

Saving a Workbook to the Database

Oracle Discoverer

N → Create/Open Workbook

Connect to Oracle Discoverer

1. In the Connect to Oracle Discoverer window, enter the requested information.

Using Discoverer 4i Web

2. Select a responsibility.

3. Select on the Open an Existing Workbook and select the Database option.

Using Discoverer 4i Web
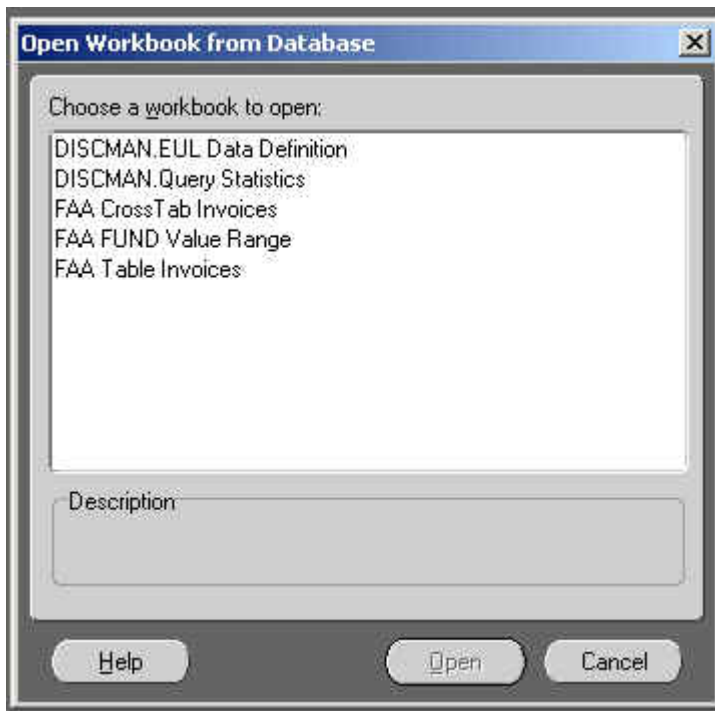
4. Select the desired workbook from the list of values.
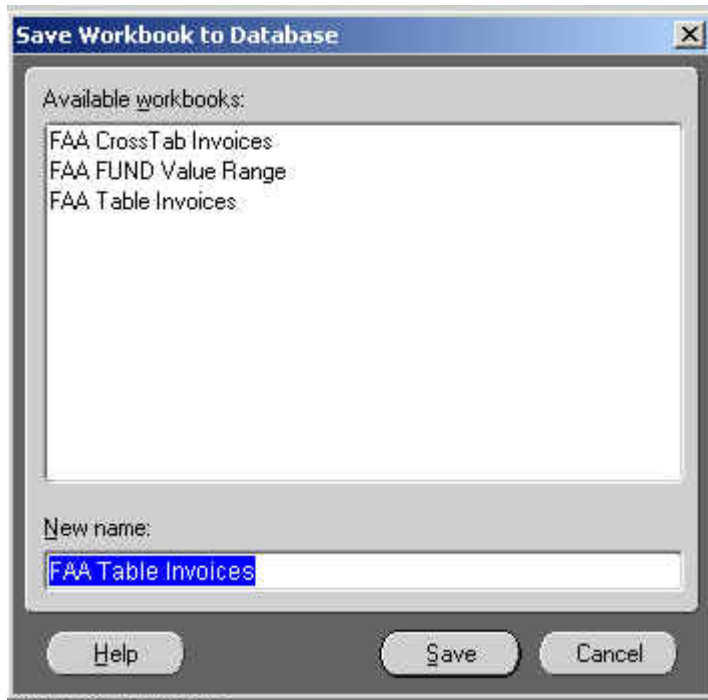
5. Make appropriate changes or create a new workbook. Select Save As from File on the Toolbar.

6. Name your workbook.

7. Select (B) Save.

Lab 1: Creating a Table Layout Workbook

Instructions
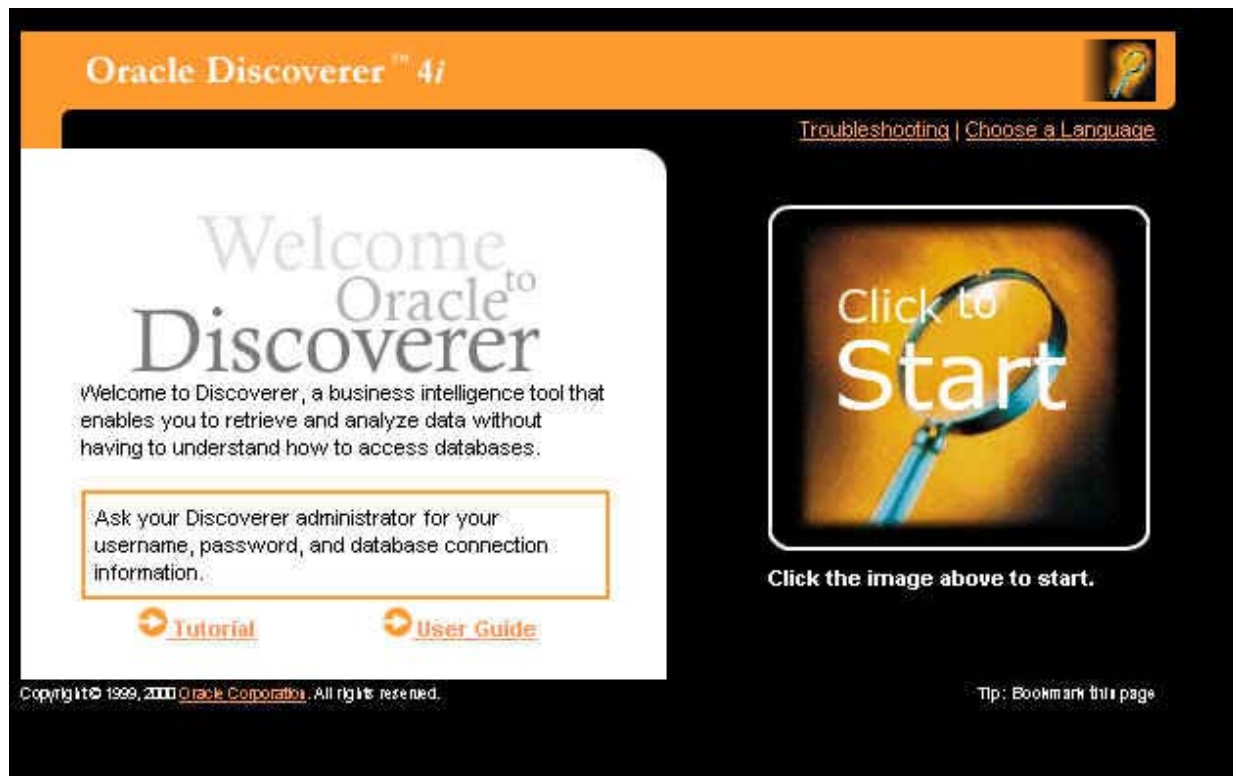
You need a report that contains Invoice Number, Invoice Date and Invoice Amount without any date criteria or amount criteria.

The report display information is as follows:

- Invoice Date in Column 1

- 75 rows per page

- Gridlines

- Invoice Amount with currency as the number type

- Invoice Date sorted low to high

Select OK to allow report to be displayed.

Lab 1 Solutions: Creating a Table Layout Workbook

1. Access the Discoverer 4i Web tool and select Start.

   N → Internet Explorer
   http://discoverdelphi.dot.gov:7779/discwb4/html/english.ms_ie/start/ie.htm

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Table Layout Workbook
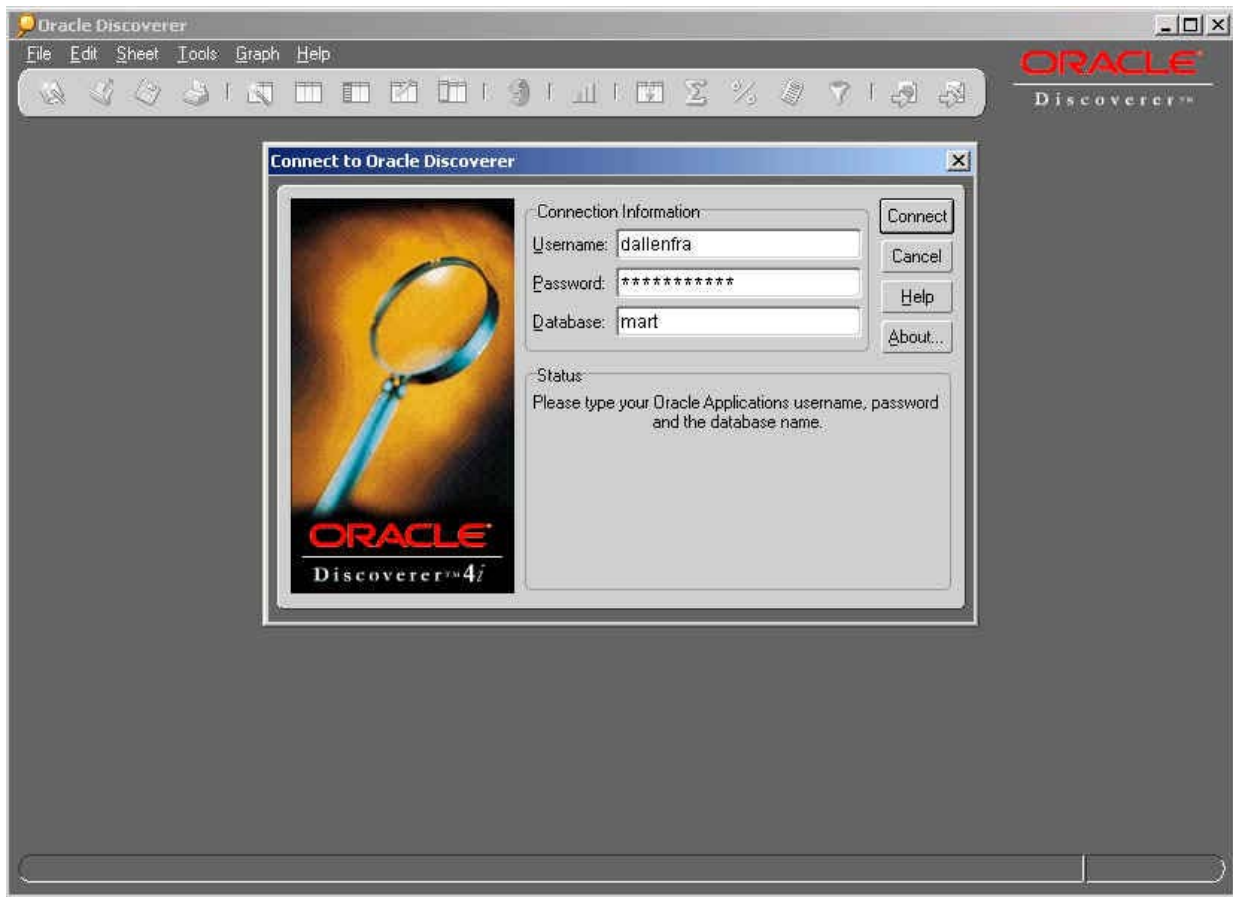
2.   Enter Username, Password, and Database assigned by the instructor.

Lab 1 Solutions: Creating a Table Layout Workbook
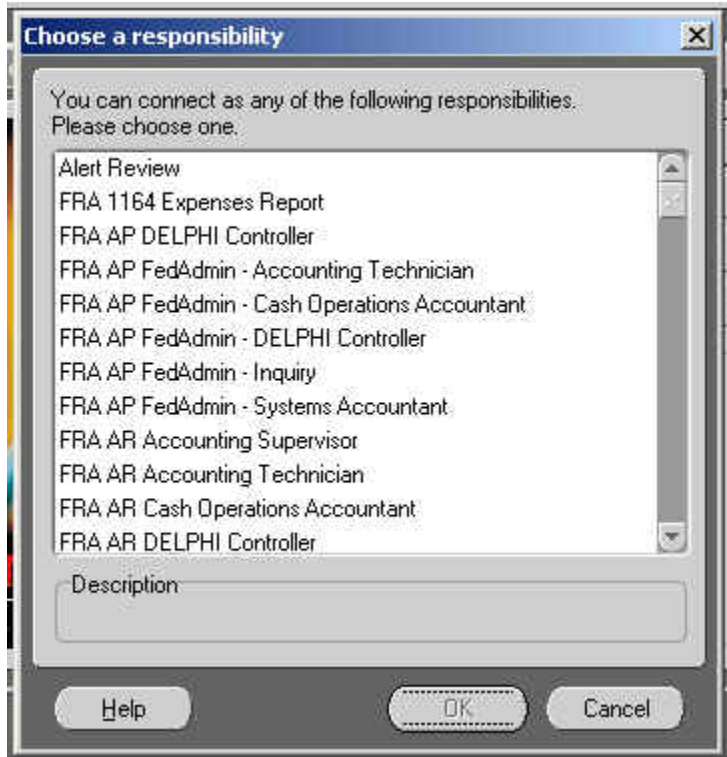
3. Select the Training Responsibility assigned by the instructor.

Lab 1 Solutions: Creating a Table Layout Workbook
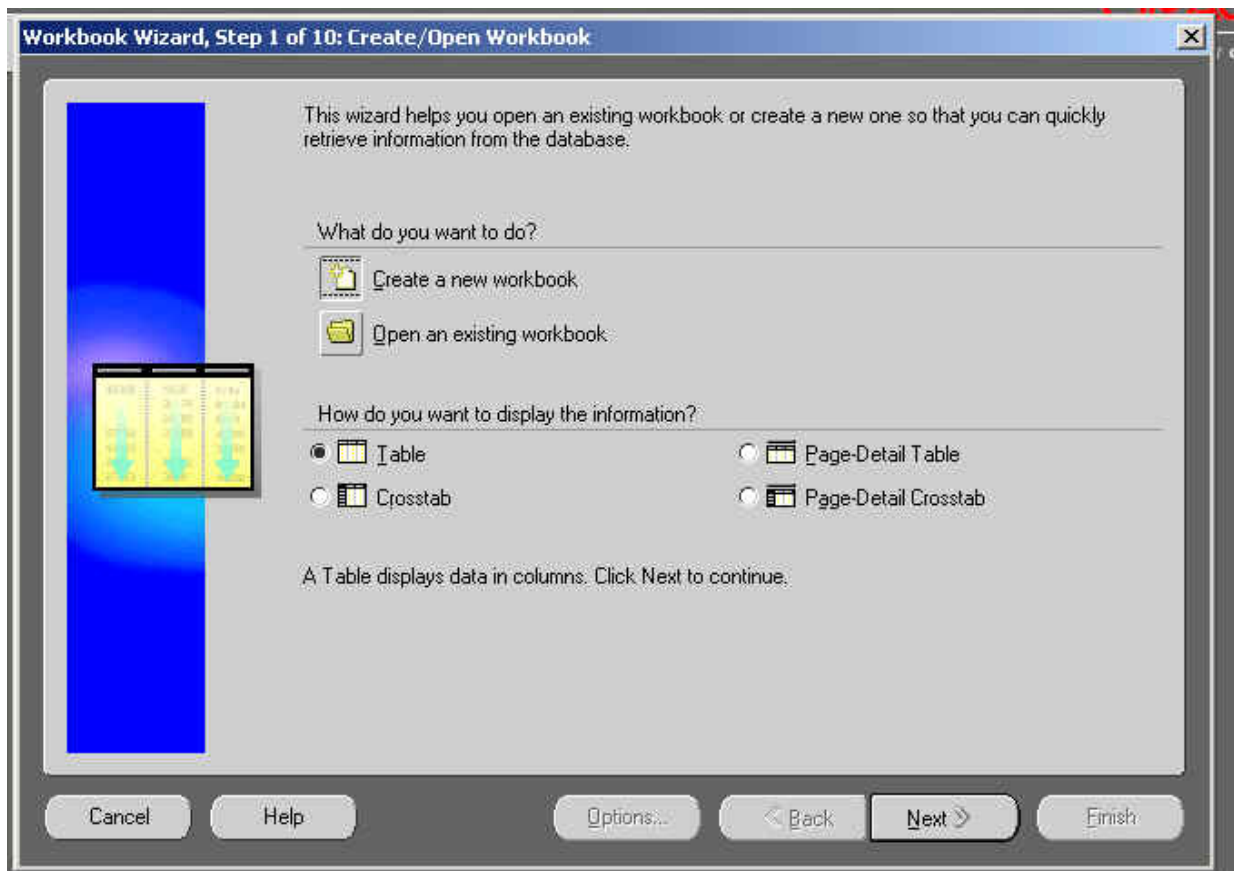
4. Select the Create a New Workbook Icon.

5. Select the Table Layout Workbook design and select (B) Next.

Lab 1 Solutions: Creating a Table Layout Workbook
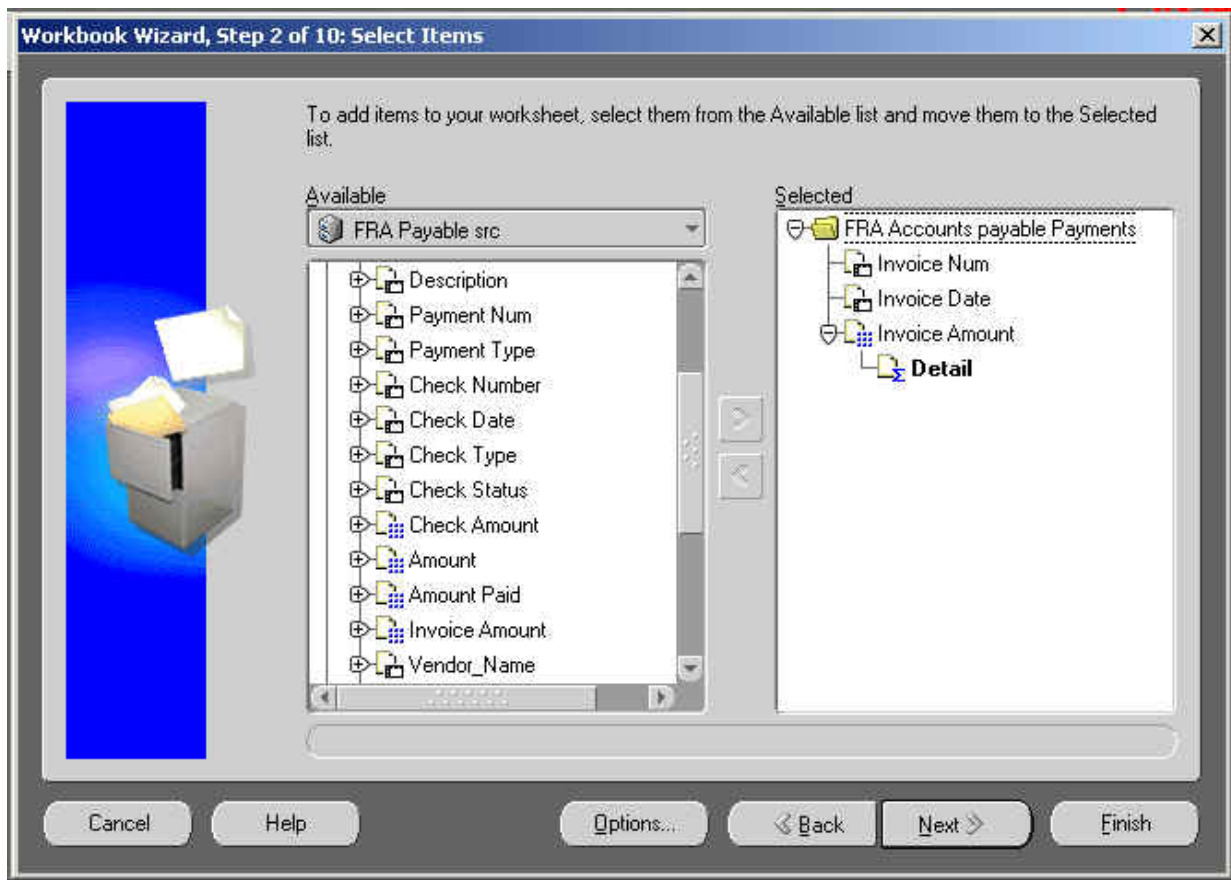
6. Select on the dropdown arrow on the Available Box.

7. Select Accounts Payable-Payments, Invoice Num, Invoice Date and Invoice Amount from the Business Area. Select (B) Next to continue.

    Hint: Select on the item and use the > top arrow key to move it from the left side to the right side.

Lab 1 Solutions: Creating a Table Layout Workbook
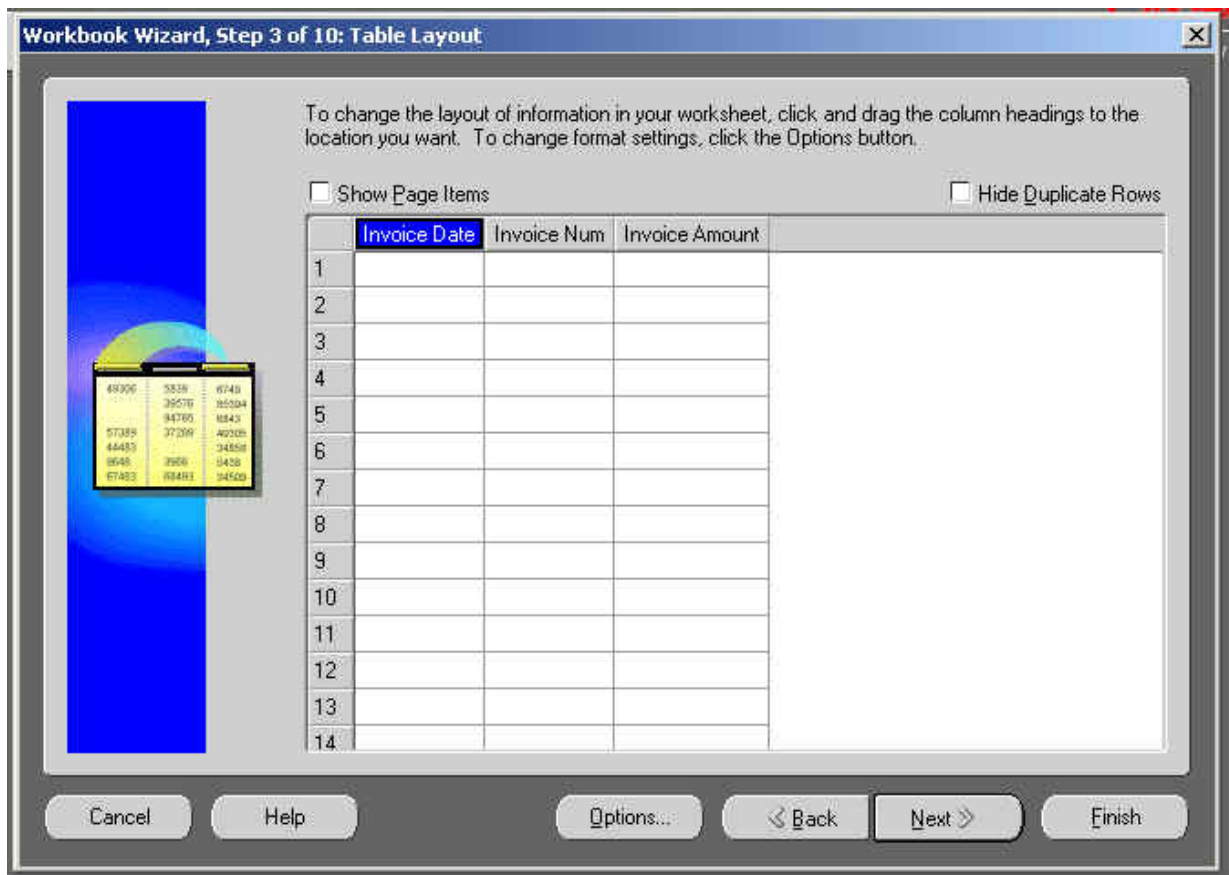
8. You want Invoice Date to be in Column 1. Select on Invoice Date and drag to Column 1.

9. Select Options on the Table Layout screen.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Table Layout Workbook
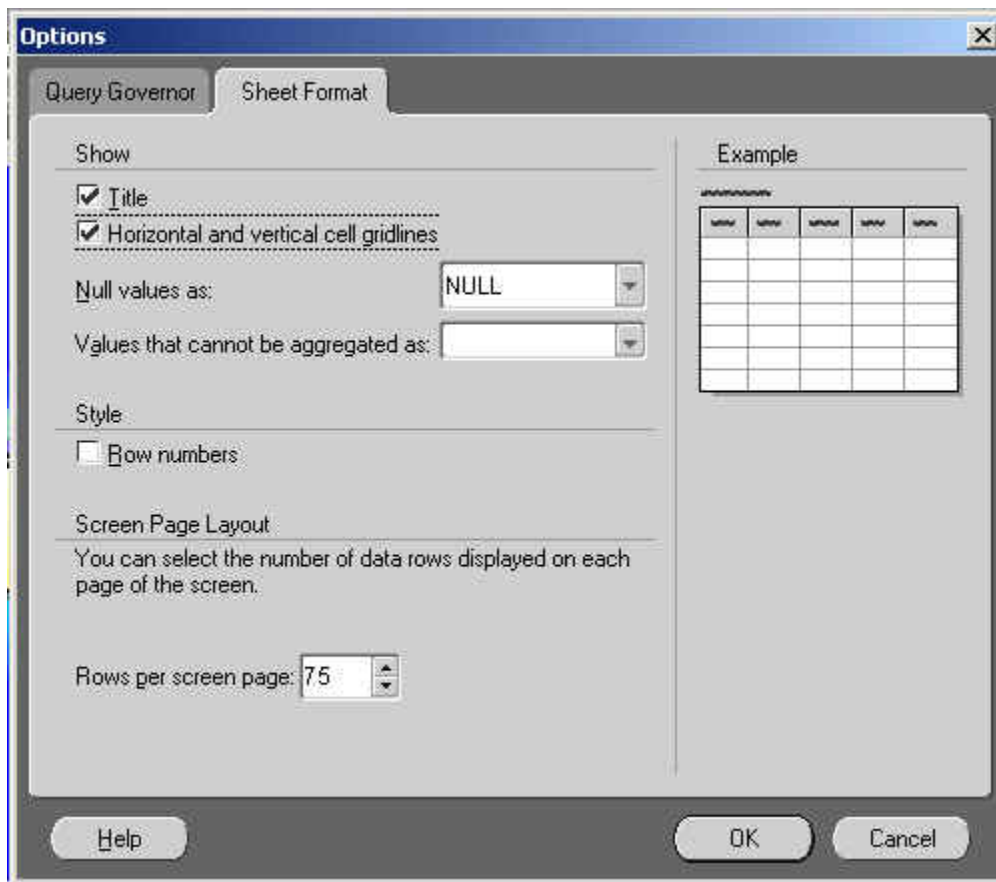
10. Select the Horizontal and vertical cell gridlines checkbox. Change the Rows per screen page from 66 to75 per page and select (B) OK. The Table Layout screen will appear.

11. Select (B) Next in the Table Layout screen.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Table Layout Workbook
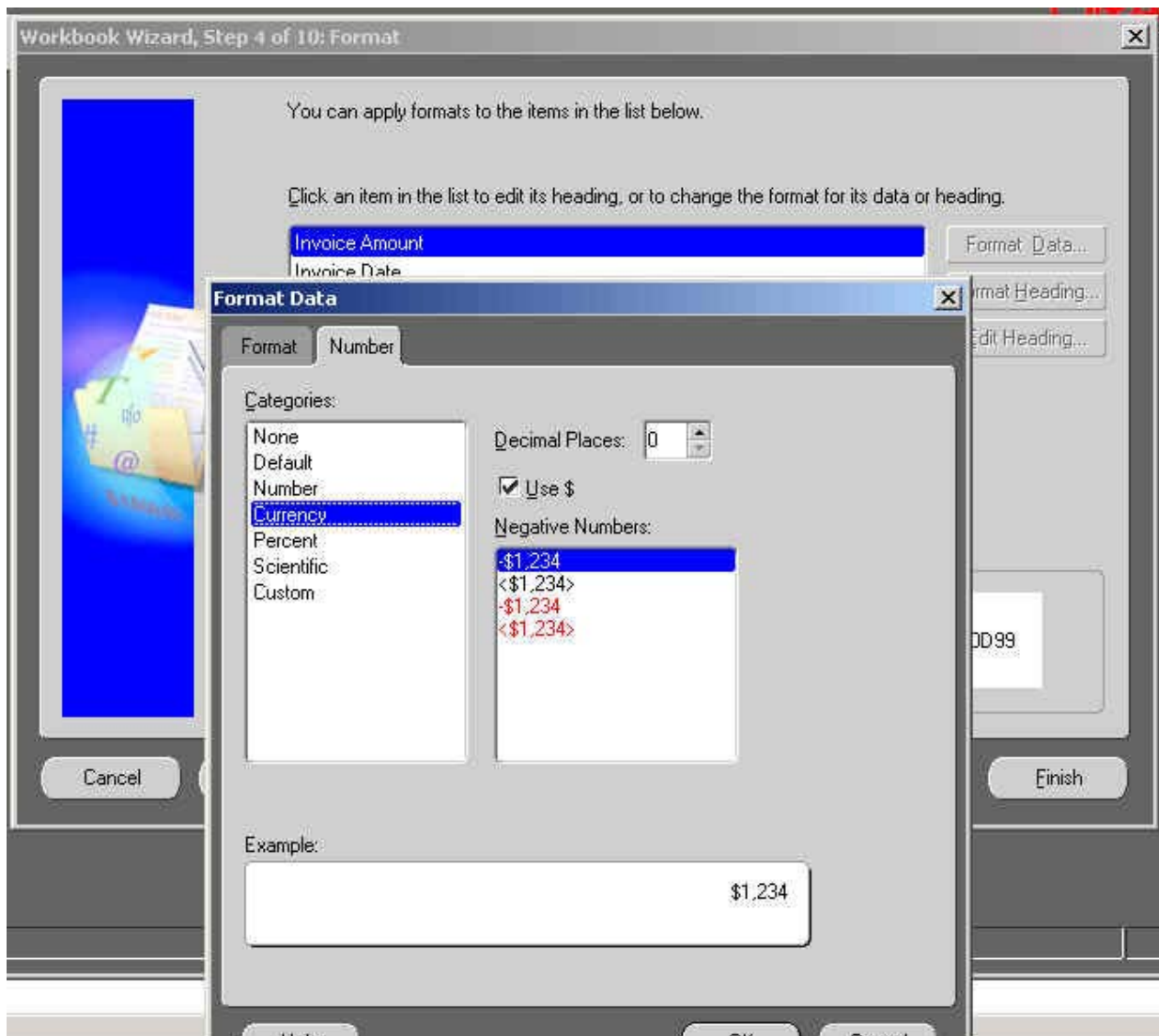
12. Select Invoice Amount and select on the (B) Format Data. The Format Data window will appear.

13. Select the Number tab and then select Currency as the Type.

14. Select OK. Select (B) Next and then select (B) Next again.

Lab 1 Solutions: Creating a Table Layout Workbook
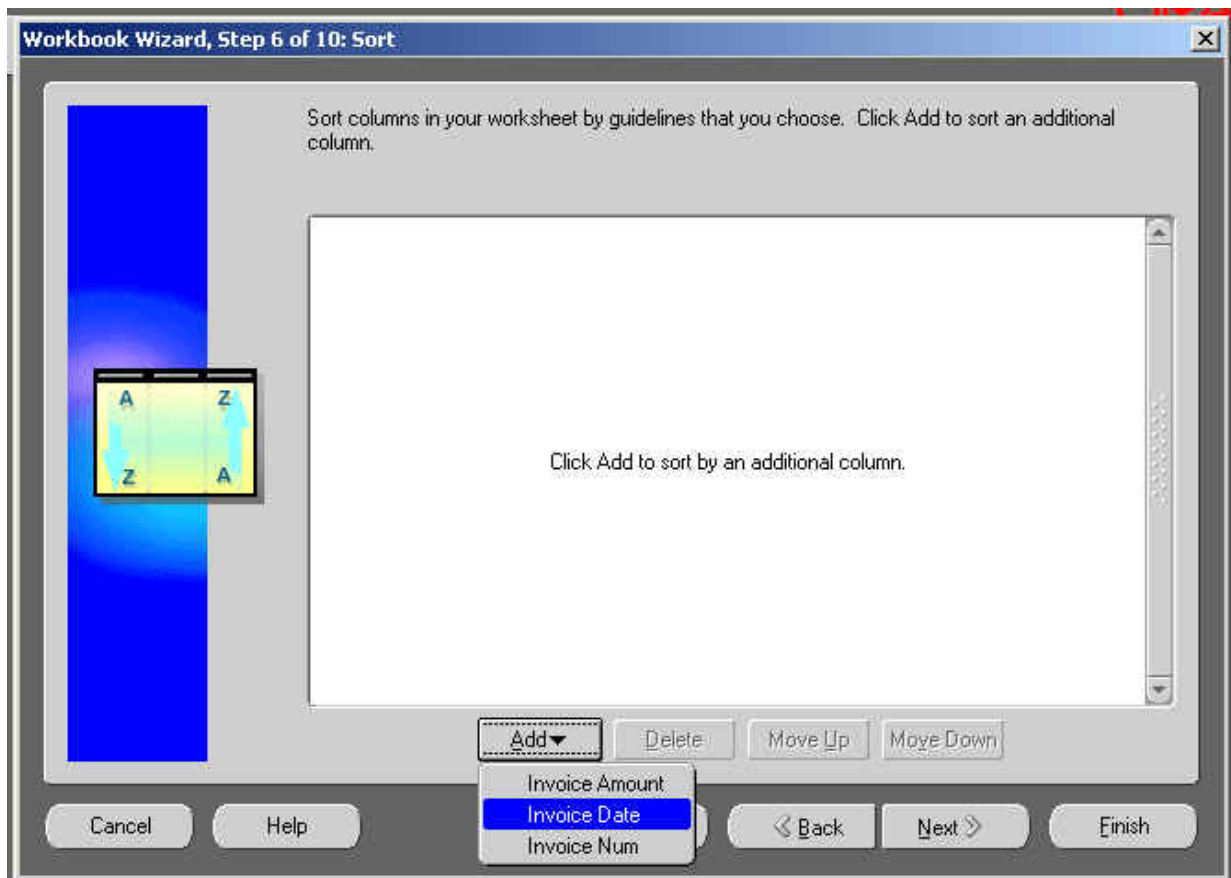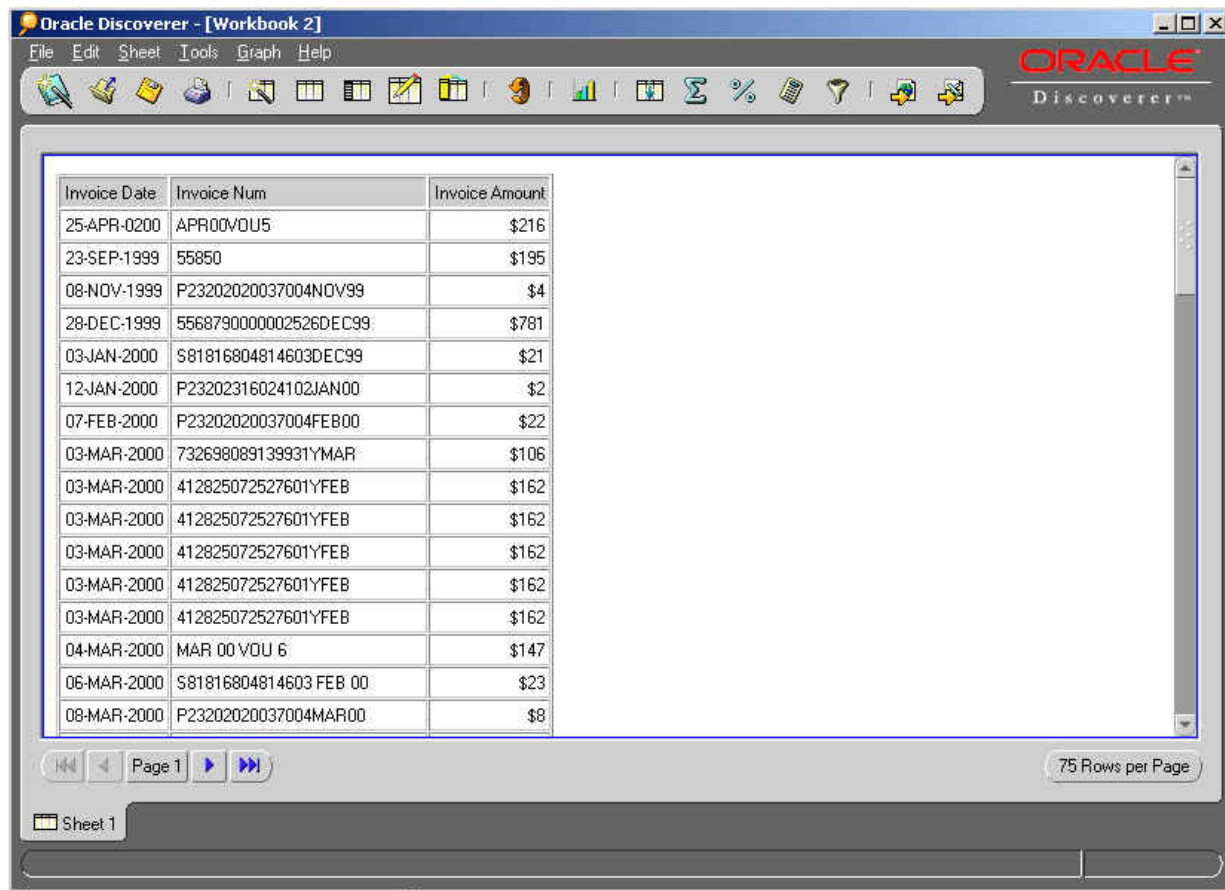
15. Select (B) Add. A dropdown menu will appear. Select Invoice Date.

Lab 1 Solutions: Creating a Table Layout Workbook
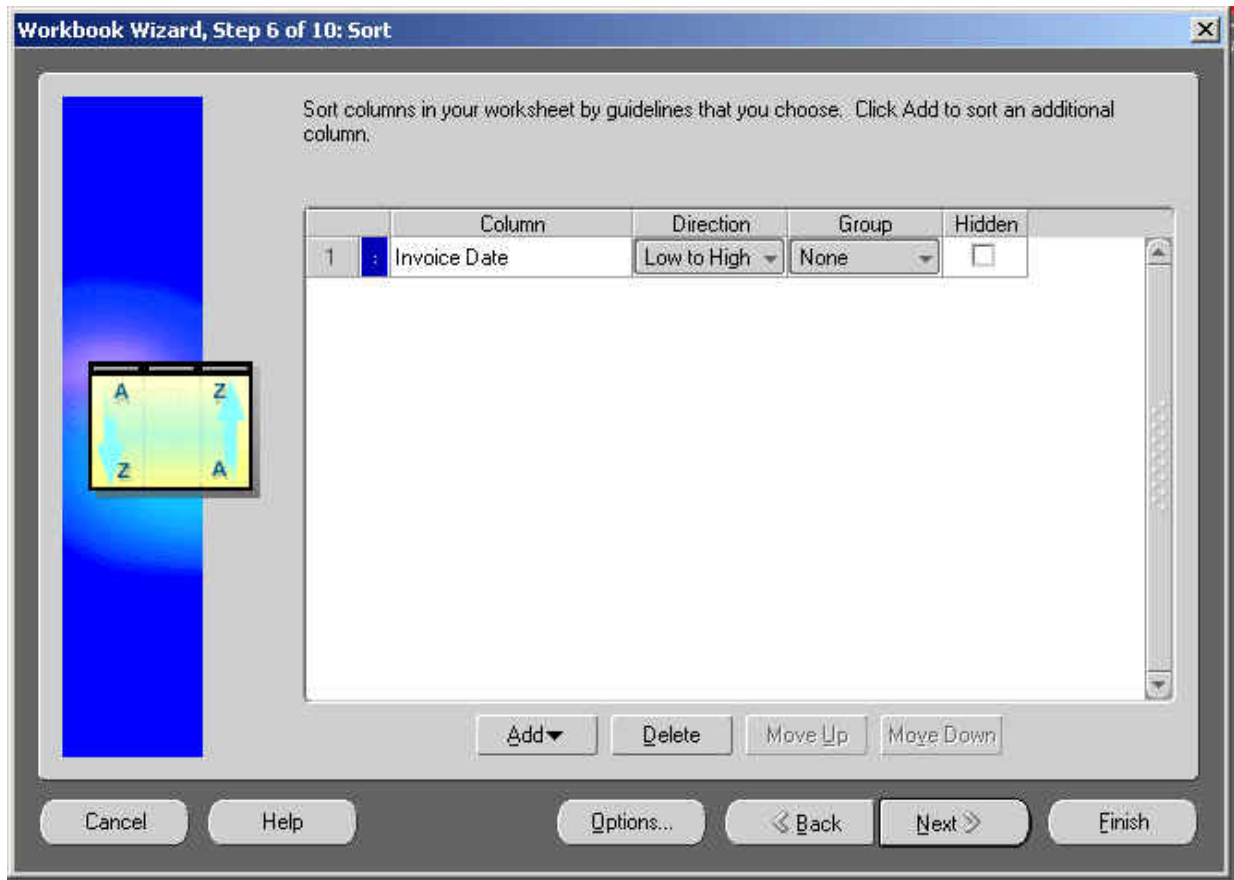
16. Select Low to High for Direction and then select (B) Finish. This allows the report to be queried.

Lab 1 Solutions: Creating a Table Layout Workbook

17. Go to Lab2: Saving a Table Layout Workbook. Do not exit the report.

Using Discoverer 4i Web

Lab 2:Saving a Workbook to the Database

Instructions

You have completed your workbook and now need to save it to the database for retrieval later.

Save your workbook as XX Table Layout LAB1. XX will be your monitor number that will be assigned by your instructor.

Using Discoverer 4i Web

Lab 2 Solutions: Saving a Workbook to the Database
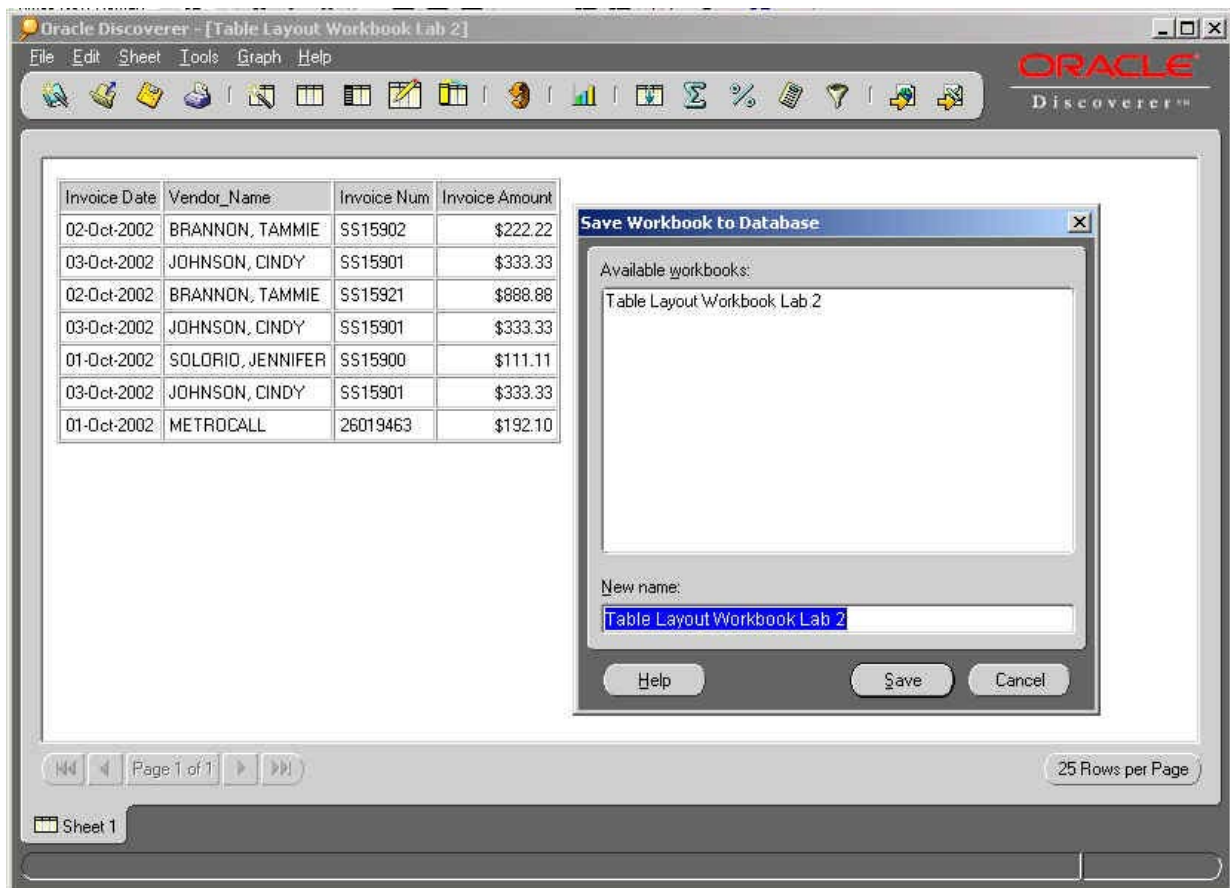
1. Select (M) File: Save As. Name the report XX Table Layout LAB1. The XX will refer to your monitor number assigned to you by your instructor.

2. Select (B) Save.
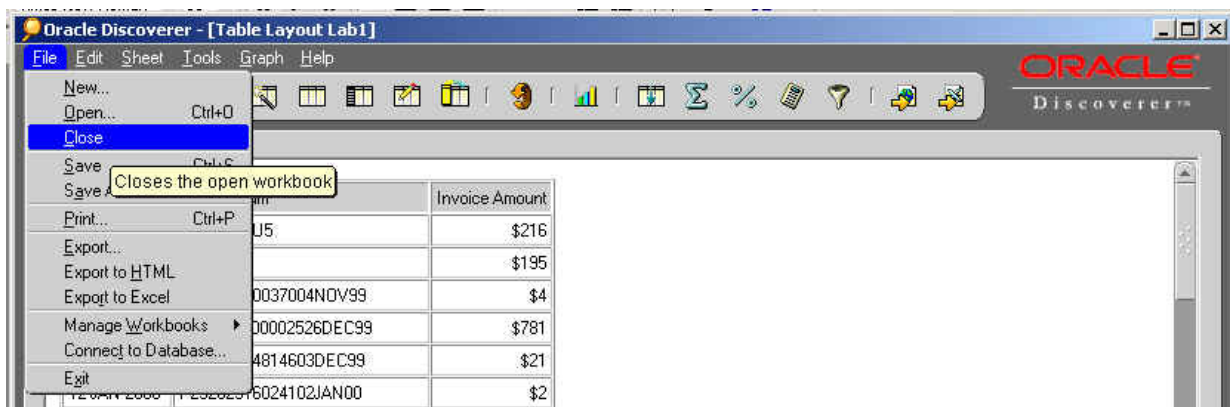
3. To close Discoverer, select (M) File: Close.

Using Discoverer 4i Web

Editing a Worksheet

> Oracle Discoverer
>
> N → Create/Open Workbook
>
> Connect to Oracle Discoverer

1. In the Connect to Oracle Discoverer window, enter the requested information.

Choose a responsibility

You can connect as any of the following responsibilities. Please choose one.

- Alert Review
- FRA 1164 Expenses Report
- FRA AP DELPHI Controller
- FRA AP FedAdmin - Accounting Technician
- FRA AP FedAdmin - Cash Operations Accountant
- FRA AP FedAdmin - DELPHI Controller
- FRA AP FedAdmin - Inquiry
- FRA AP FedAdmin - Systems Accountant
- FRA AR Accounting Supervisor
- FRA AR Accounting Technician
- FRA AR Cash Operations Accountant
- FRA AR DELPHI Controller

Description

Help   OK   Cancel

2. Select a responsibility.

Using Discoverer 4i Web

3. Select the Open an Existing Workbook and select the Database option.

Using Discoverer 4i Web
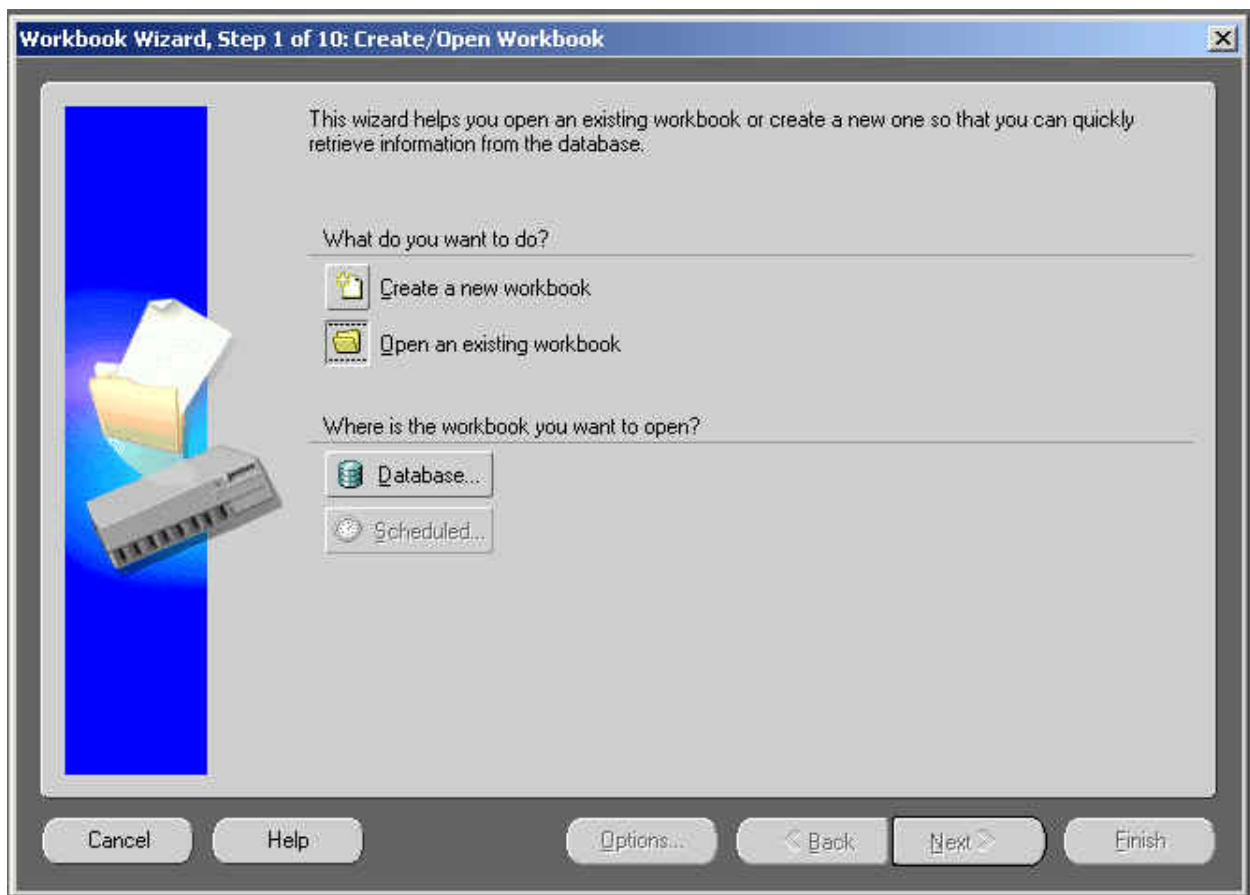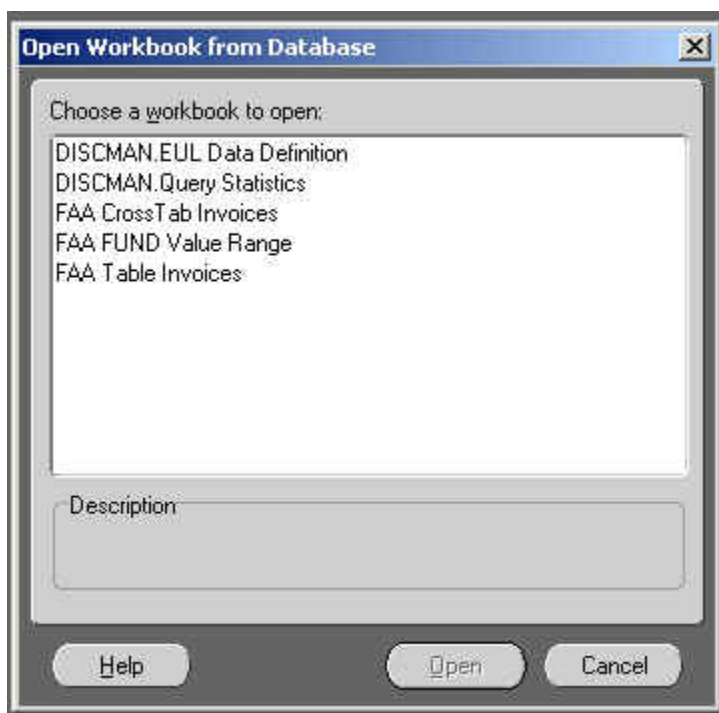
4. Select the desired workbook from the list of values. There are two ways to edit a worksheet.

Worksheet
N → Menu Bar → Sheet → Edit Sheet
Edit Worksheet Dialog Box
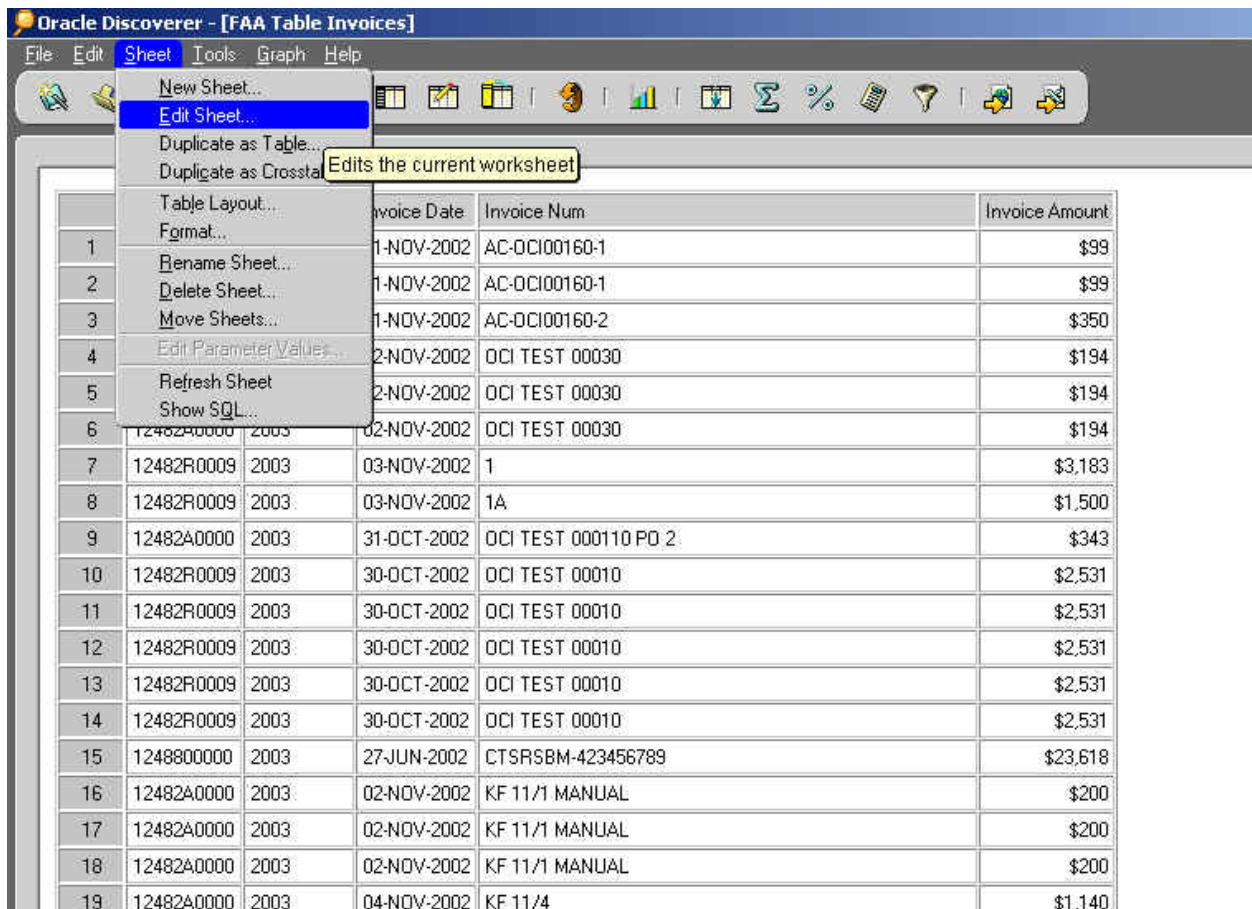
Worksheet
N → Menu Bar → Edit Worksheet Icon
Edit Worksheet Dialog Box
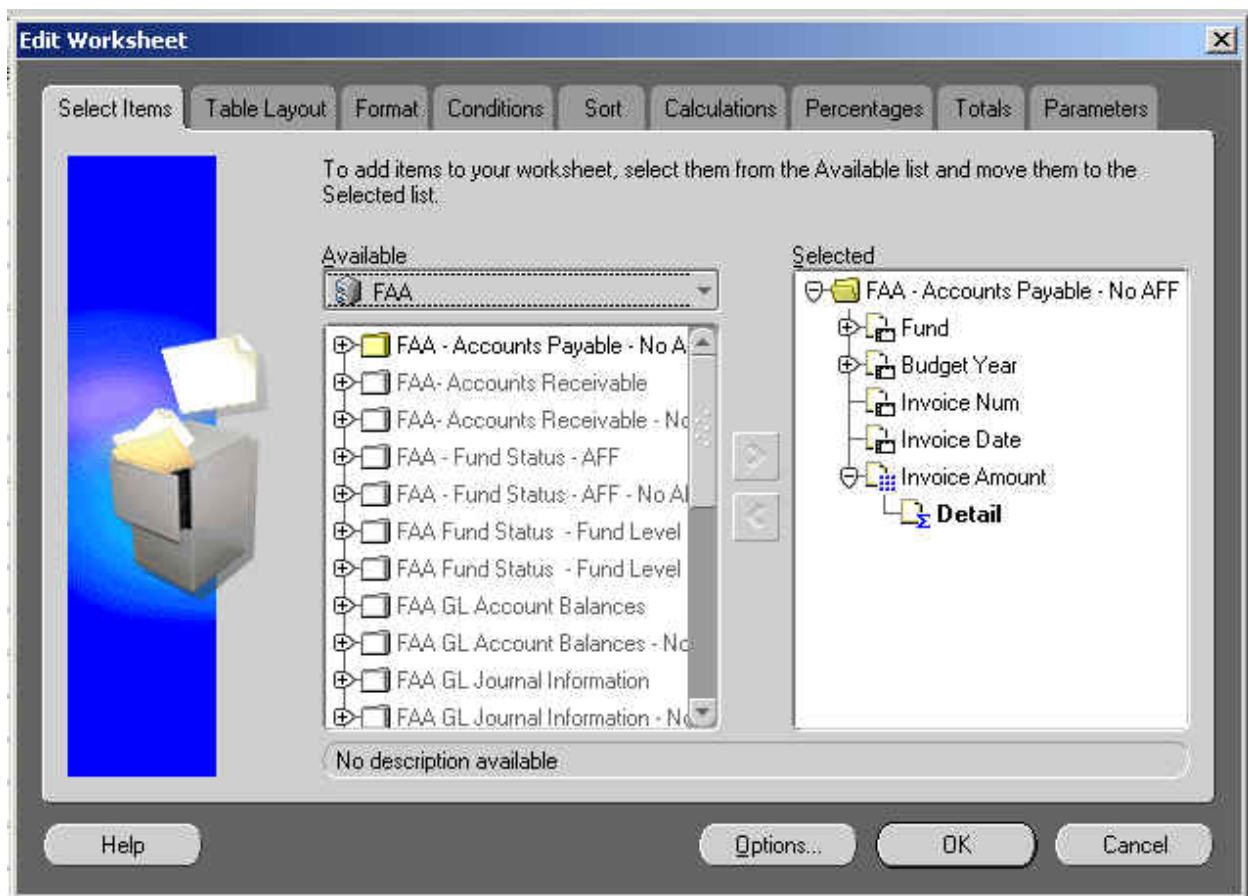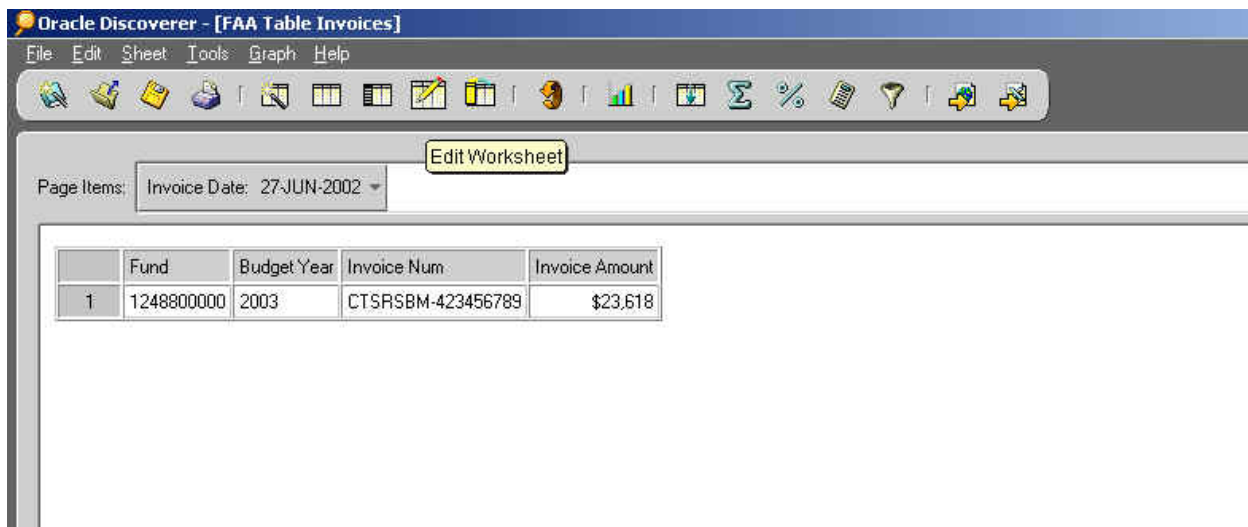
5. Select on the Edit Worksheet Icon or select Sheet from the Menu Bar and Edit Worksheet from the dropdown list of values. Once one of these options has been executed the Edit Worksheet Dialog box will appear.

6. Select the desired tab where you would like to make changes.

7. Select OK to update the worksheet.

Deleting a Worksheet in a Workbook

Oracle Discoverer
N → Create/Open Workbook
Connect to Oracle Discoverer

Note: A worksheet can be deleted only if 2 or more worksheets exist.

1. In the Connect to Oracle Discoverer window, enter the requested information.

2. Select a responsibility.

3. Select the Open an Existing Workbook and choose the Database option.

Using Discoverer 4i Web
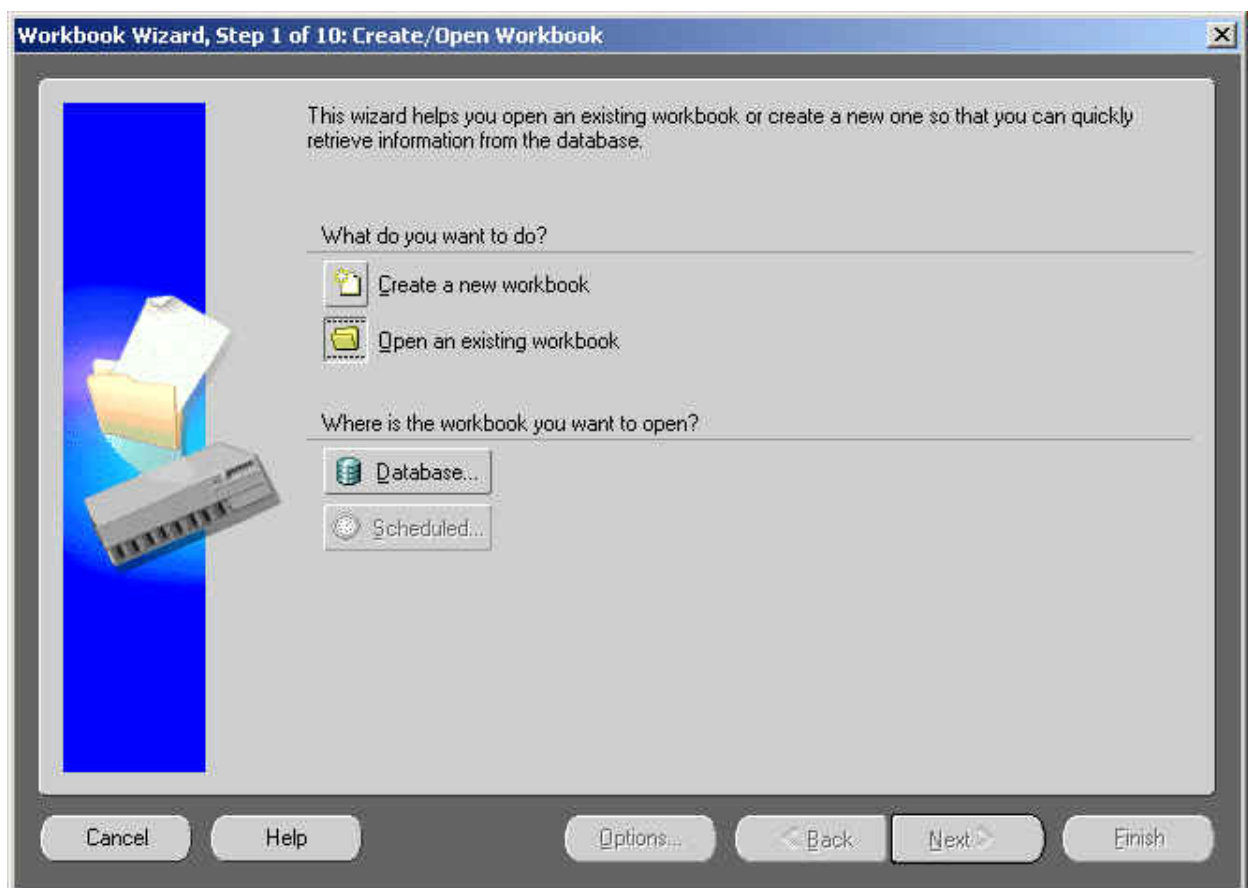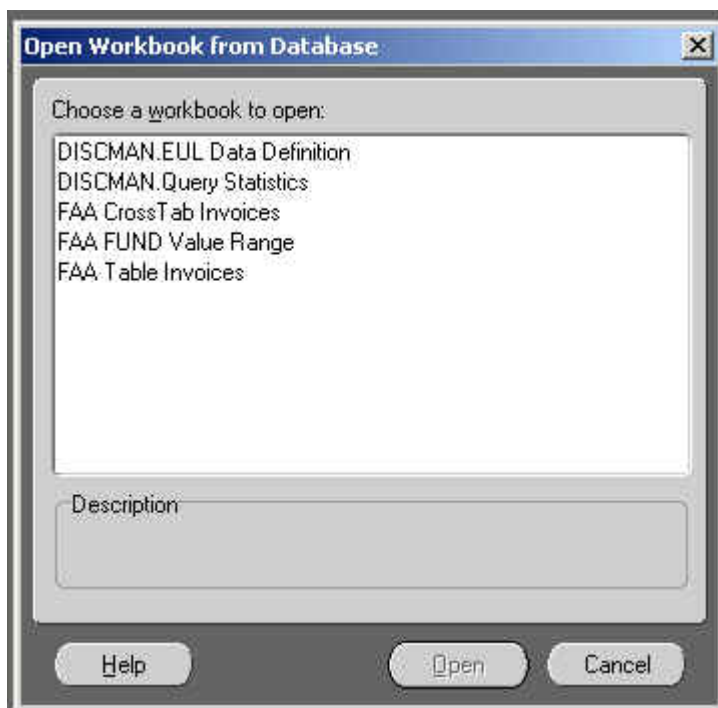
4. Select the desired workbook from the list of values. There are two ways to rename a worksheet in a workbook.

5. Go to the Sheet tab at the bottom left of the workbook screen. Select sheet with the right-mouse button and select delete from the list of values.
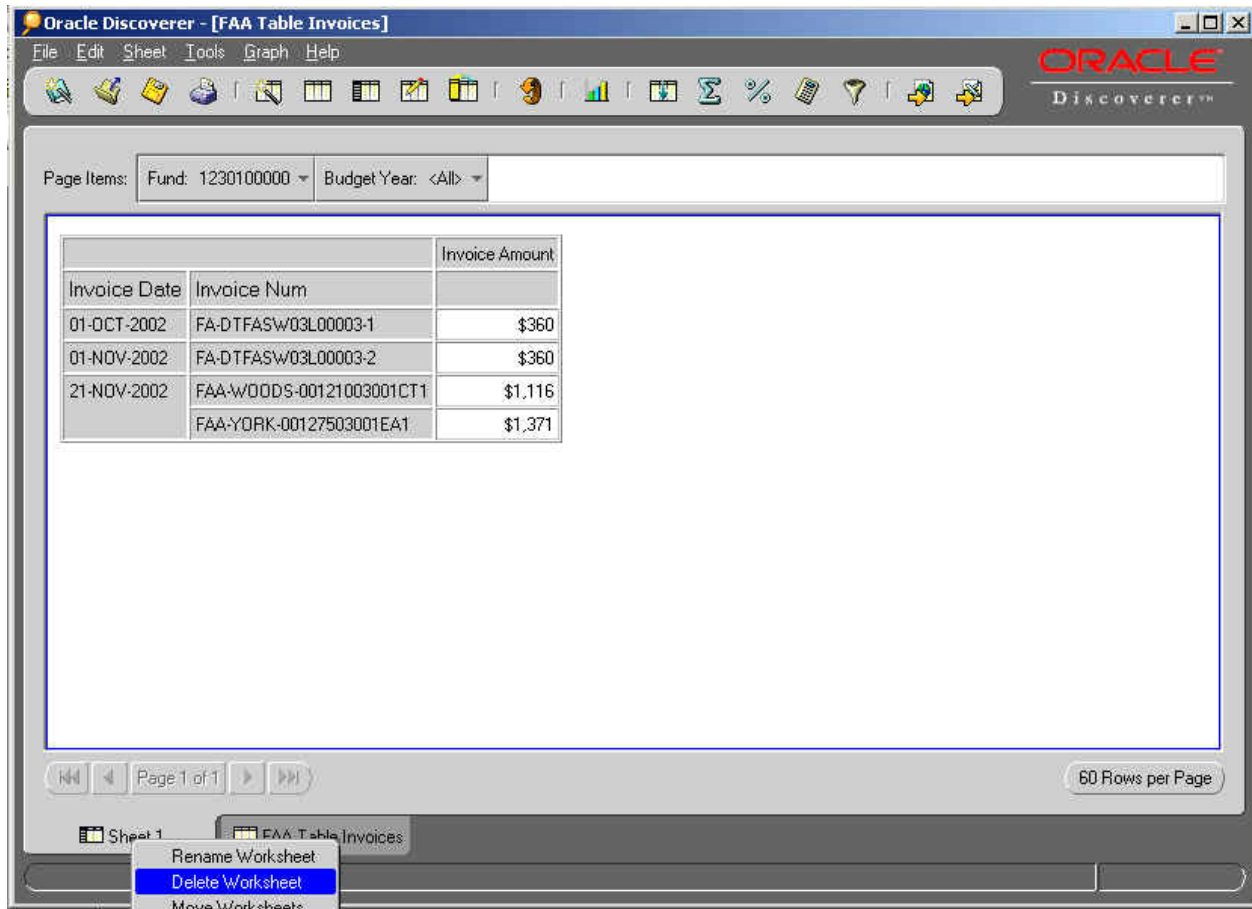
6. You will receive a warning dialog box, select Yes or No.

Using Discover 4i Web

7. Select Sheet from the Toolbar and select Delete Sheet. The delete warning box will appear, select Yes or No.
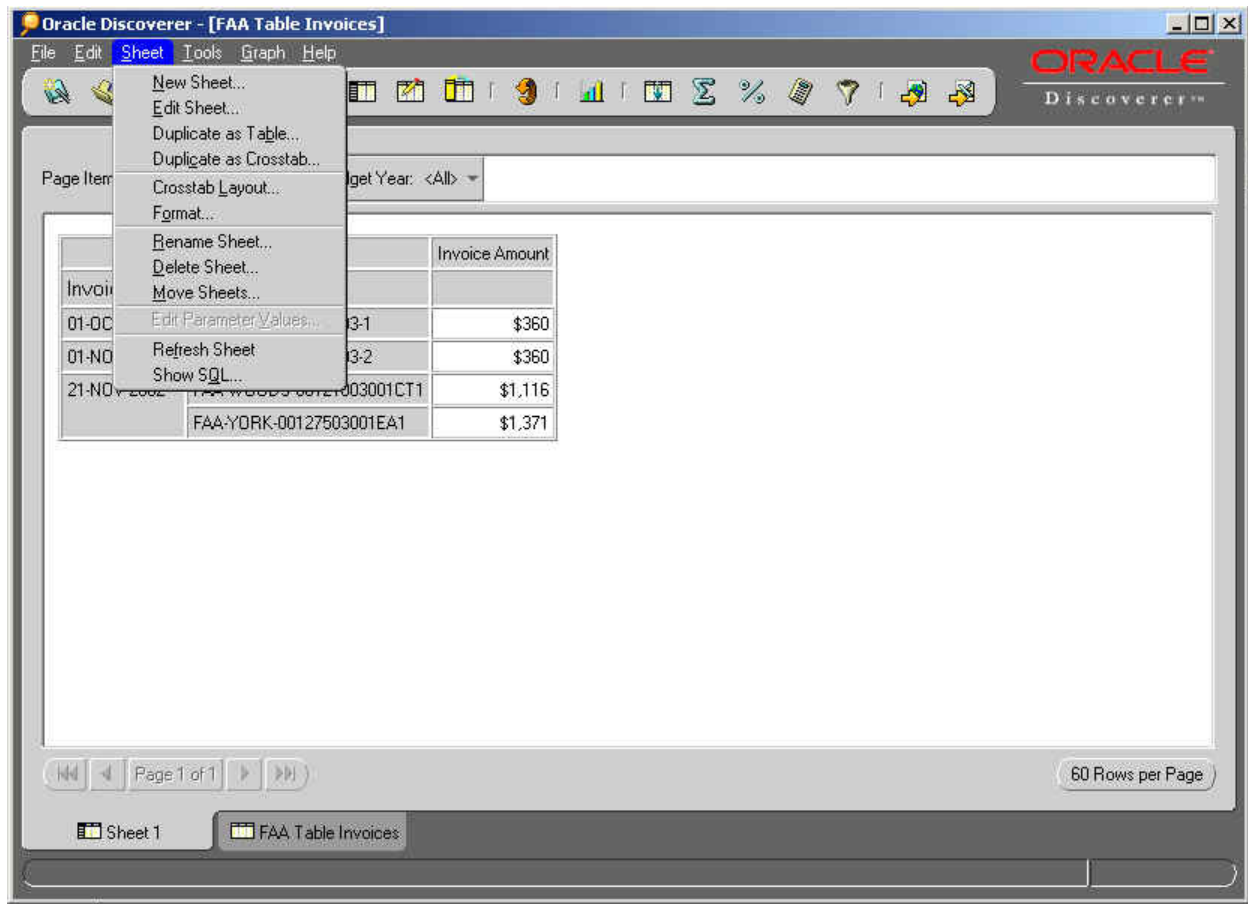
Renaming a Worksheet in a Workbook

> Oracle Discoverer
>
> N → Create/Open Workbook
>
> Connect to Oracle Discoverer

1. In the Connect to Oracle Discoverer window, enter the requested information.
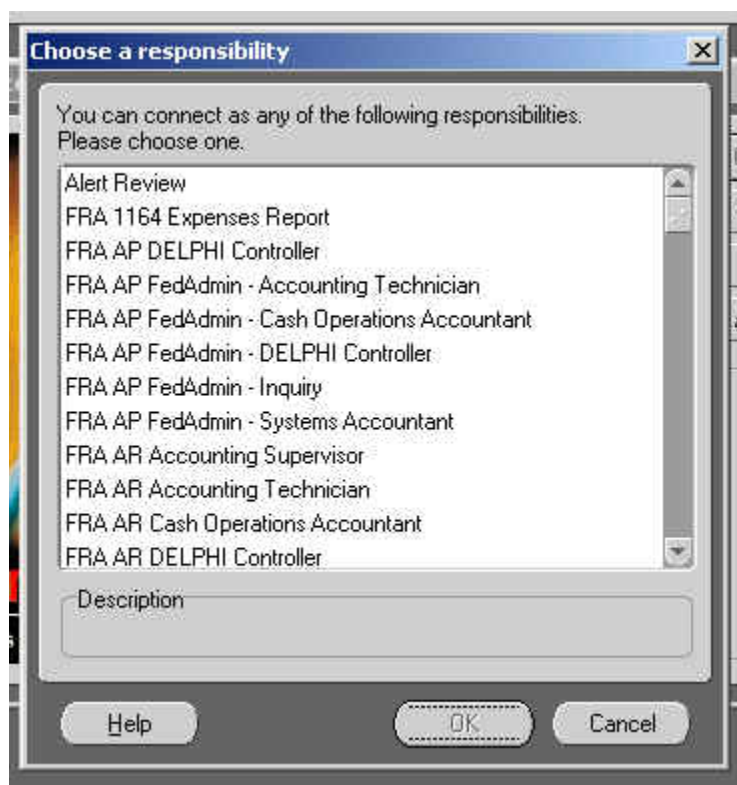
2. Select a responsibility.
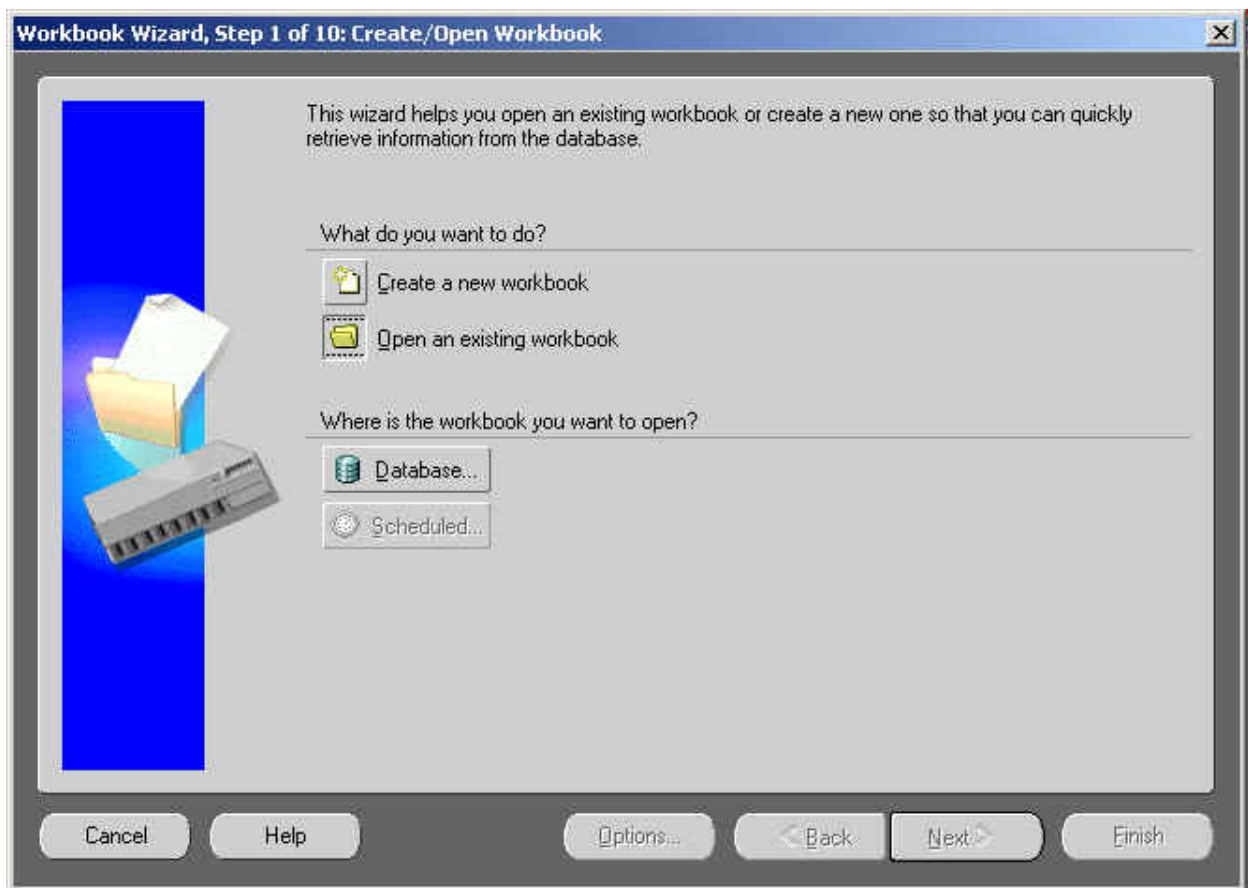
3. Select the Open an Existing Workbook and select the Database option.
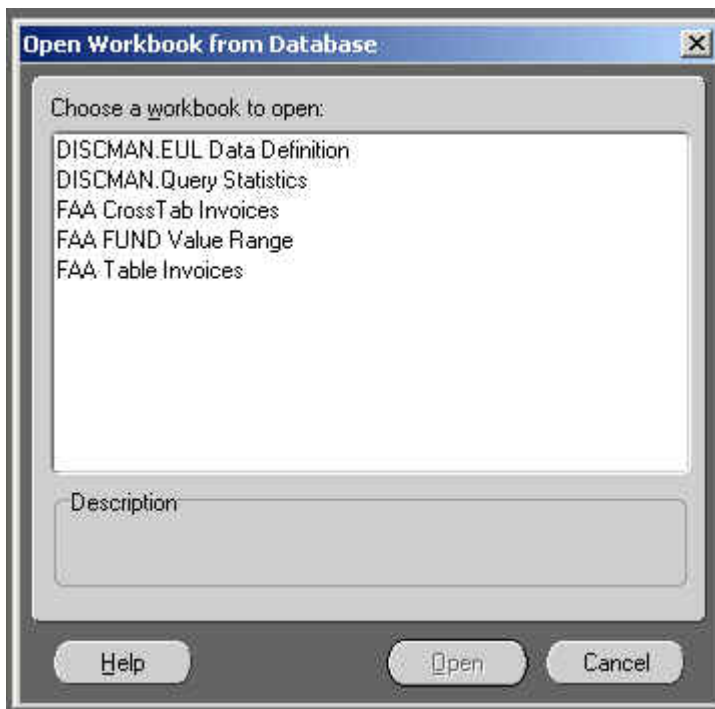
4. Select the desired workbook from the list of values. There are two ways to rename a worksheet in a workbook.

5. Double-click the Sheet tab at the bottom left of the workbook screen. The rename dialog box will be displayed. Make desired changes and select OK.
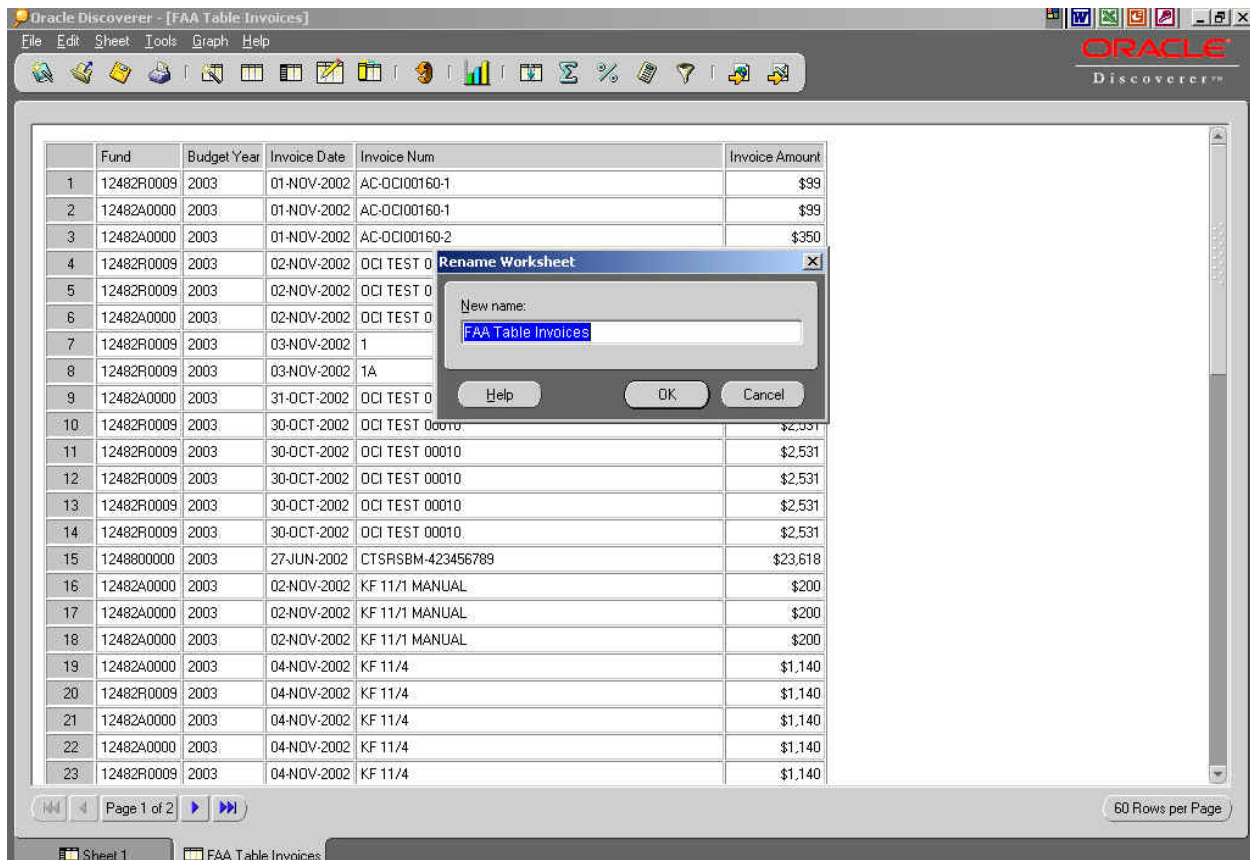
6. Select Sheet from the Toolbar and select Rename Sheet. The rename dialog box will be displayed. Make desired changes and select OK.

Creating Conditions

Oracle Discoverer

N → Create/Open Workbook

Connect to Oracle Discoverer

1. In the Connect to Oracle Discoverer window, enter the requested information.

Using Discoverer 4i Web

2. Select a responsibility.

Workbook Wizard, Step 1 of 10: Create/Open Workbook

This wizard helps you open an existing workbook or create a new one so that you can quickly retrieve information from the database.

What do you want to do?

Create a new workbook

Open an existing workbook

Where is the workbook you want to open?

Database...

Scheduled...

Cancel   Help   Options...   < Back   Next >   Finish

3. Select the Open an Existing Workbook and choose the Database option.

Open Workbook from Database

Choose a workbook to open:

DISCMAN.EUL Data Definition
DISCMAN.Query Statistics
FAA CrossTab Invoices
FAA FUND Value Range
FAA Table Invoices

Description

Help   Open   Cancel

Using Discoverer 4i Web

4. Select the desired workbook from the list of values.

You can create conditions in the New Condition Dialog box. Users can select or deselect administrator defined conditions as well as conditions defined in another worksheet of the workbook.

Creating Conditions

N → Menu Bar → Tools → Conditions

Edit Worksheet Dialog Box – Conditions Tab

Creating Conditions

N → Menu Bar → Conditions Icon

Edit Worksheet Dialog Box – Conditions Tab

5. Define conditions to limit worksheet results by criteria you specify.

6. To edit a current condition, select the desired condition and make changes.

7. Select OK to update the worksheet.

8. To create a new condition, select New. The New Conditions dialog box will appear.

Using Discoverer 4i Web

New Condition

What would you like to name your condition?

☑ Generate name automatically

What description would you like to give your condition?

Formula

Item	Condition	Values
	=	

Advanced >>

☑ Match case

This condition is located in the workbook 'FAA Table Invoices'.

Help   OK   Cancel

9. Name your conditions or check the box to generate a name automatically.

10. Enter a description for your condition.

11. Under the Formula area you can choose to type text in a single quote or select a value from the dropdown list. (Commas must separate multiple values.)

   Item – The dropdown list provides a list of the selected items. You can choose an item from this list or type in a unique value.

Using Discoverer 4i Web
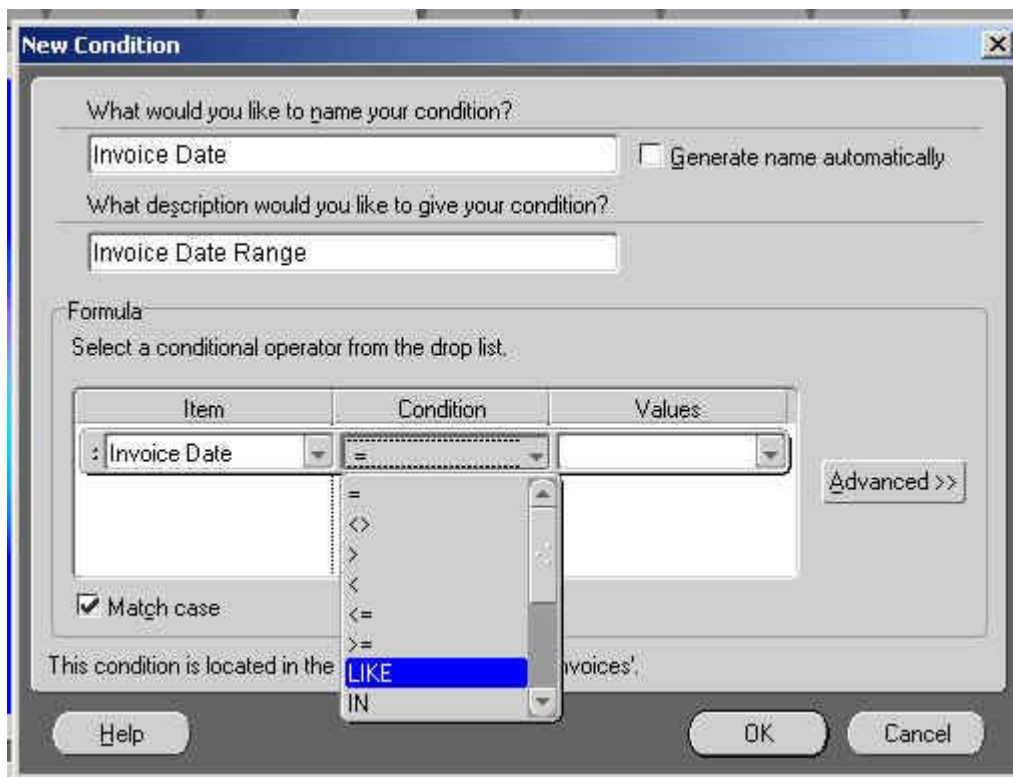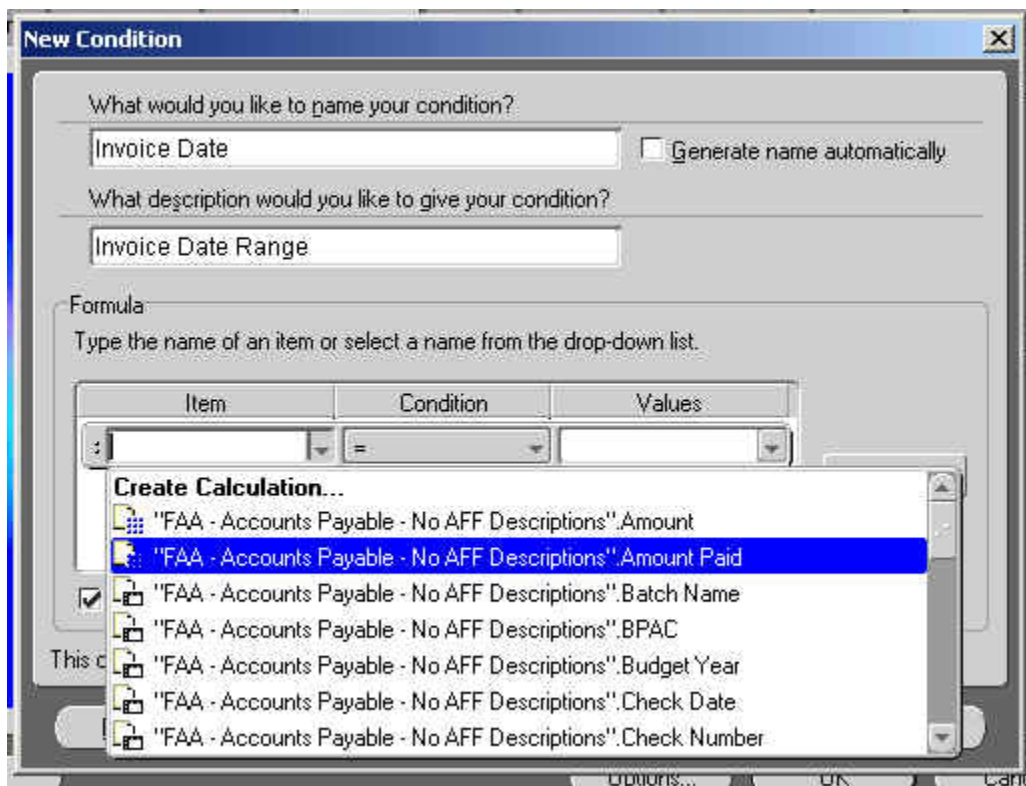
Condition – select from the list of values what you would like the condition to be such as, +, between, in, like, > or < etc.

Values – if you choose to select an item, you will see a dropdown list of the selected items.
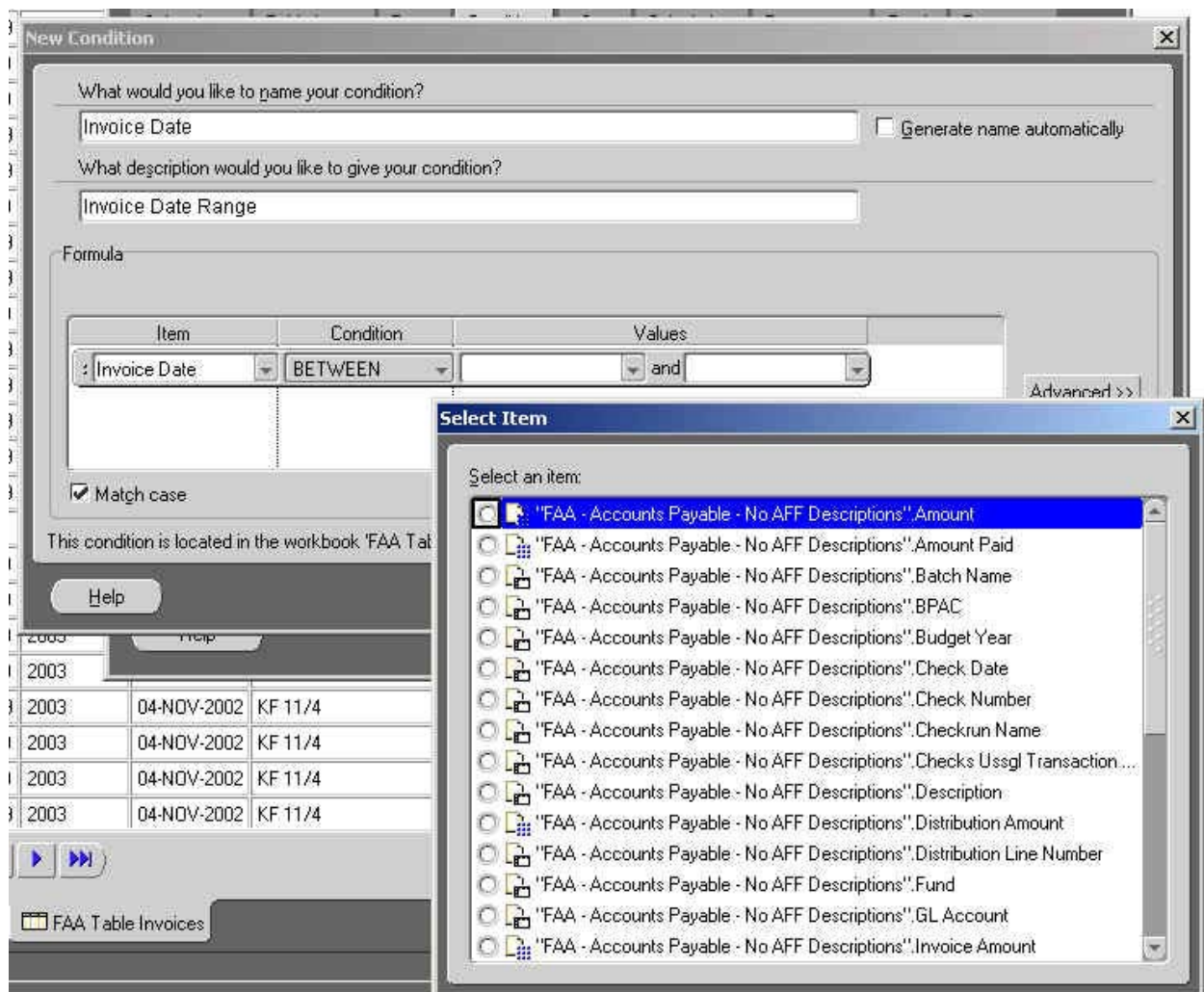
Values – if you choose to create a calculation the New Calculation dialog box will appear.

Values – if you choose to create a new parameter the New Parameter dialog box will appear.

Using Discoverer 4i Web

You can create multiple conditions within a condition by selecting the "Advanced Button".

New Condition

What would you like to name your condition?

Invoice Date ☐ Generate name automatically

What description would you like to give your condition?

Invoice Date Range

Formula

Type text in single quotes or select a value from the drop-down list. Multiple values must be separated by commas. Click one of the Insert buttons to create new items or conditions. Shift-click to select multiple items, or drag items to reorder.

Item	Condition	Values	Insert
Invoice Date	BETWEEN	'09-OCT-2002' and '01-DEC-2002'	New Item
Budget Year	=	2002	And
			Or
			Delete
			Undo

☑ Match case ((Invoice Date BETWEEN '09-OCT-2002'AND'01-DEC-2002') AND)

This condition is located in the workbook 'FAA Table Invoices'.

Help   OK   Cancel

12. Once you have made your selection in the above areas select OK to display your new condition.
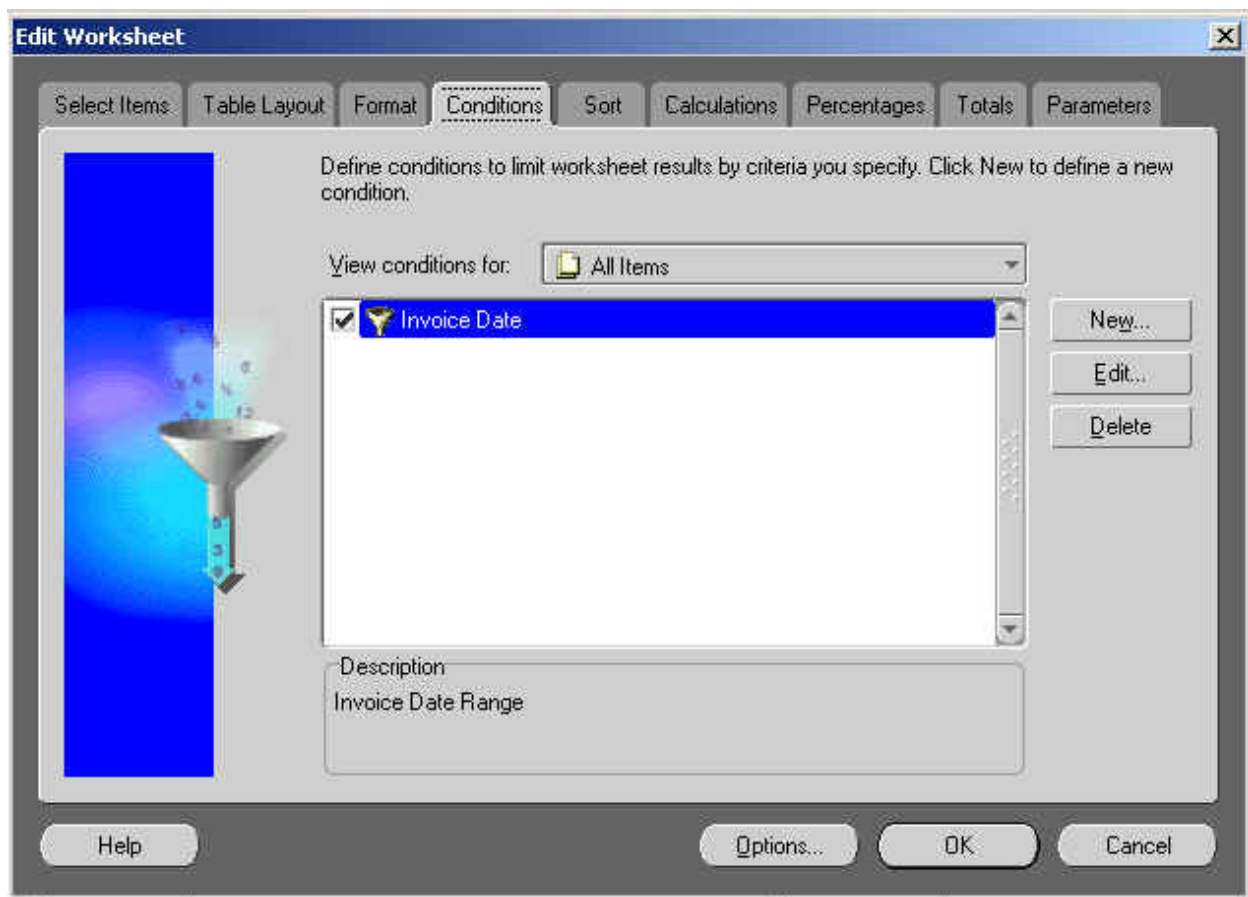
13. Select OK to execute the New Conditions. You will receive a message that your worksheet data is being refreshed by executing a new query.

	Fund	Budget Year	Invoice Date	Invoice Num	Invoice Amount
1	12482R0009	2003	01-NOV-2002	AC-OCI00160-1	$99
2	12482A0000	2003	01-NOV-2002	AC-OCI00160-1	$99
3	12482A0000	2003	01-NOV-2002	AC-OCI00160-2	$350
4	12482R0009	2003	02-NOV-2002	OCI TEST 0	
5	12482R0009	2003	02-NOV-2002	OCI TEST 0	
6	12482A0000	2003	02-NOV-2002	OCI TEST 0	
7	12482R0009	2003	03-NOV-2002	1	
8	12482R0009	2003	03-NOV-2002	1A	
9	12482A0000	2003	31-OCT-2002	OCI TEST 0	
10	12482R0009	2003	30-OCT-2002	OCI TEST 00010	$2,531
11	12482R0009	2003	30-OCT-2002	OCI TEST 00010	$2,531
12	12482R0009	2003	30-OCT-2002	OCI TEST 00010	$2,531
13	12482R0009	2003	30-OCT-2002	OCI TEST 00010	$2,531
14	12482R0009	2003	30-OCT-2002	OCI TEST 00010	$2,531
15	1248800000	2003	27-JUN-2002	CTSRSBM-423456789	$23,618
16	12482A0000	2003	02-NOV-2002	KF 11/1 MANUAL	$200
17	12482A0000	2003	02-NOV-2002	KF 11/1 MANUAL	$200
18	12482A0000	2003	02-NOV-2002	KF 11/1 MANUAL	$200

FAA Table Invoices : Progress

Running Query...

7 seconds remaining

Cancel

Using Discoverer 4i Web

Using Discoverer 4i Web

Lab 1: Creating a Table Layout Workbook with Conditions

Instructions

You need a new report that provides detailed invoice information for a specific period of time.

Using a Table Layout Workbook design you will require the following data from the available Accounts Payable-Payments Business Area: invoice number, invoice date, vendor name, and invoice amount.

The Table Layout should be displayed as follows:

- Invoice Date in the first column.

- Invoice Amount – display all amounts with a dollar mask of $999,999,999.99

- Invoice Date – display by DD/MMM/YYYY (Day, Month, Year)

- A Condition to filter the Invoice Date to see all invoices for the period of 01-OCT-2002 between 31-OCT-2002.

Lab 1 Solutions: Creating a Table Layout Workbook with Conditions

1. Access the Discoverer 4i Web tool.

   N → Internet Explorer –
   http://disoverdelphi.dot.gov:7779/discwb4/html/english.ms_ie/start_ie.htm

2. Select Start

Lab 1 Solutions: Creating a Table Layout Workbook with Conditions

3. Enter Username, Password and Database assigned by the instructor.

Using Discoverer 4i Web
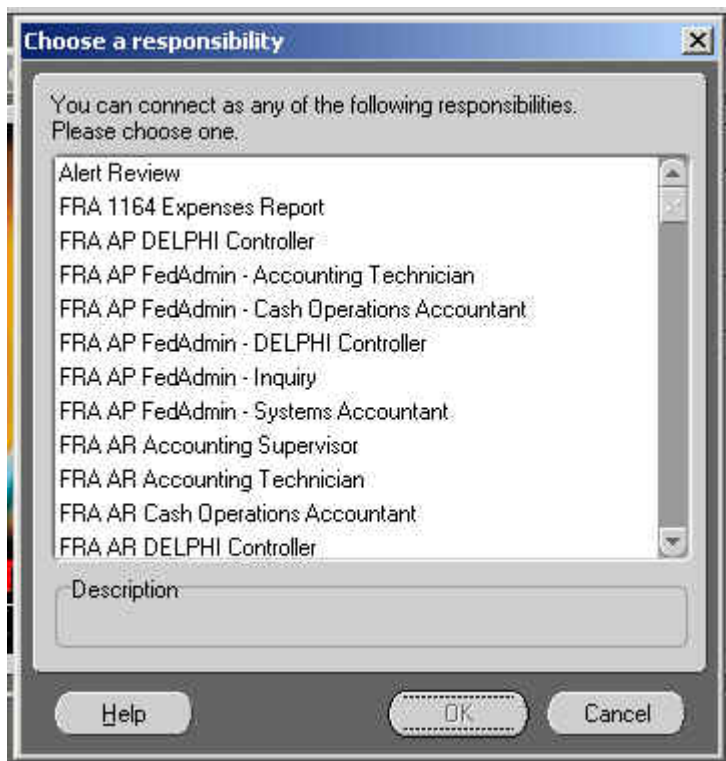
Lab 1 Solutions: Creating a Table Layout Workbook with Conditions

4. Select the Training Responsibility assigned by the instructor.
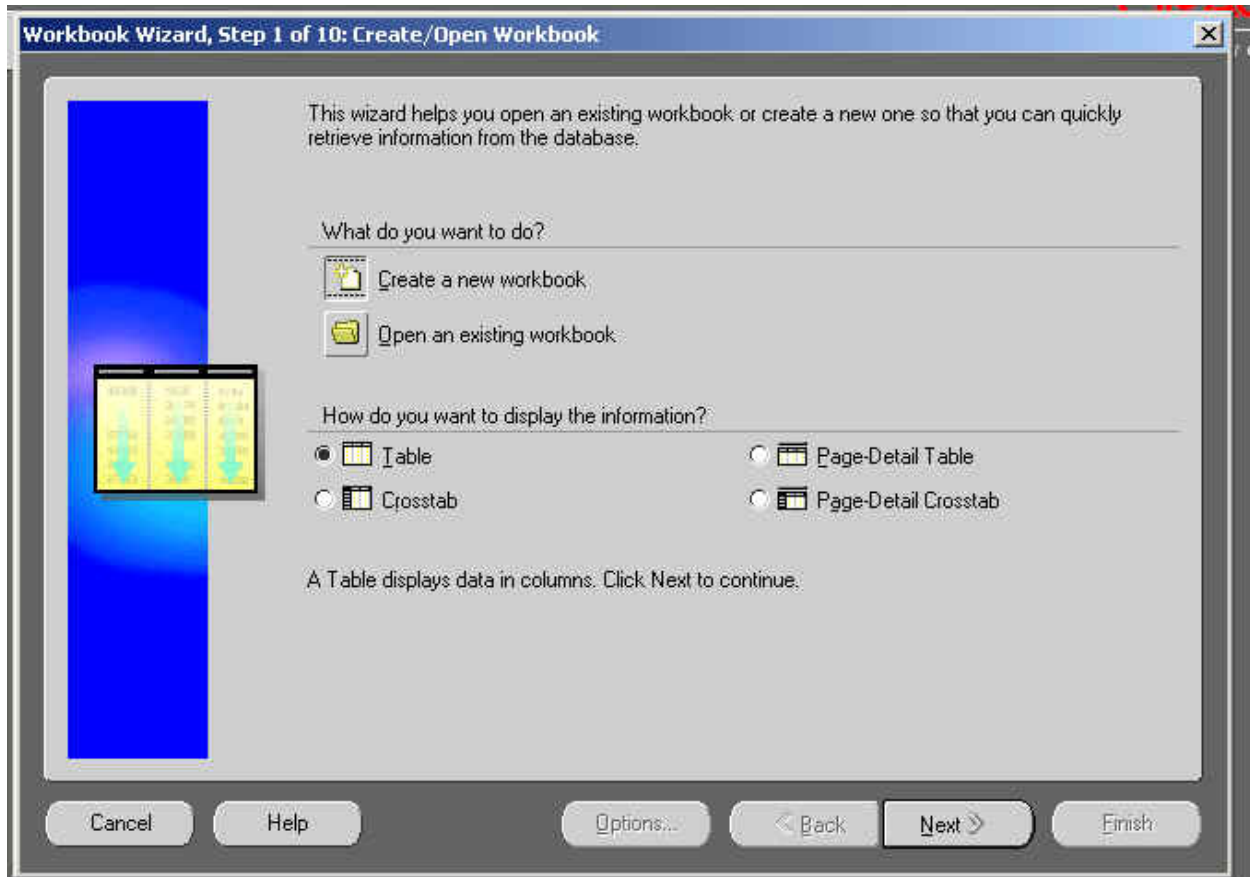
5. Select the Create a New Workbook Icon.

6. Select the Table Layout Workbook design. Select Next.

Lab 1 Solutions: Creating a Table Layout Workbook with Conditions
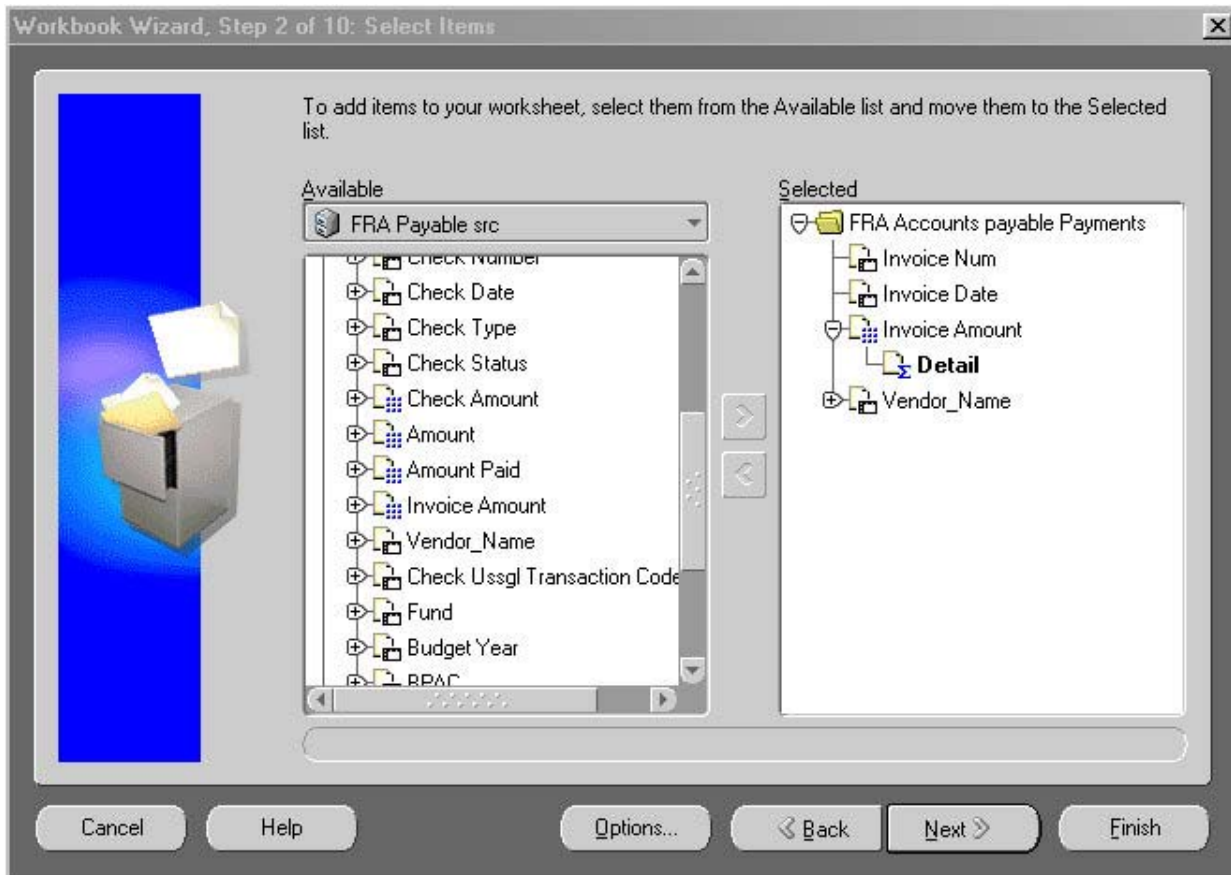
7. Select the drop-down arrow on the Available Box.

8. Select from the Business Area – Accounts Payable-Payments. Invoice Num, Invoice Date, Invoice Amount, and Vendor Name. Select (B) Next.

    Hint: Select the item and use the top → arrow key to move it from the left side to the right side.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Table Layout Workbook with Conditions
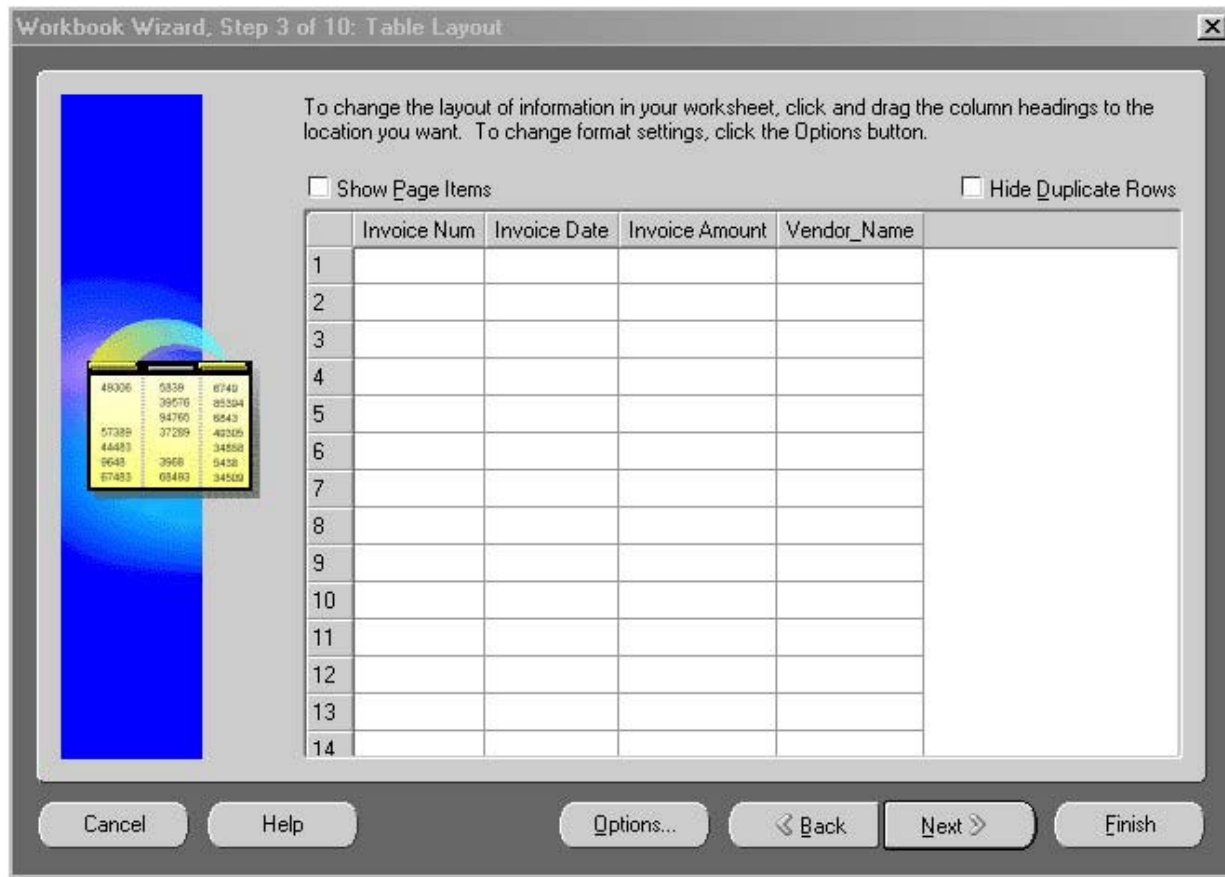
9. You want Invoice Date to be in Column 1. Select Invoice Date and drag to column 1.

Lab 1 Solutions: Creating a Table Layout Workbook with Conditions
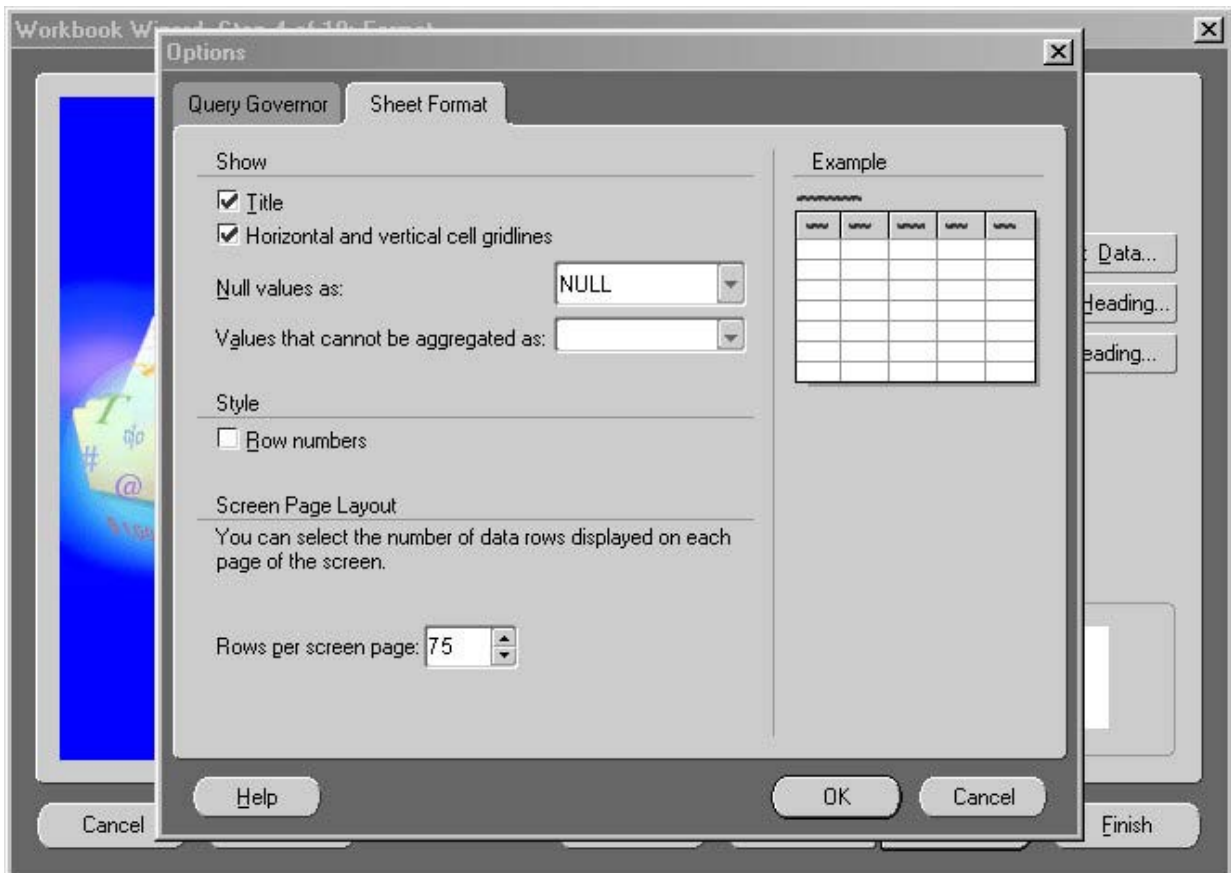
10. Select Options on the Table Layout Screen. Select the Checkbox Horizontal and Vertical Cell Gridlines. Select (B) OK.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Table Layout Workbook with Conditions
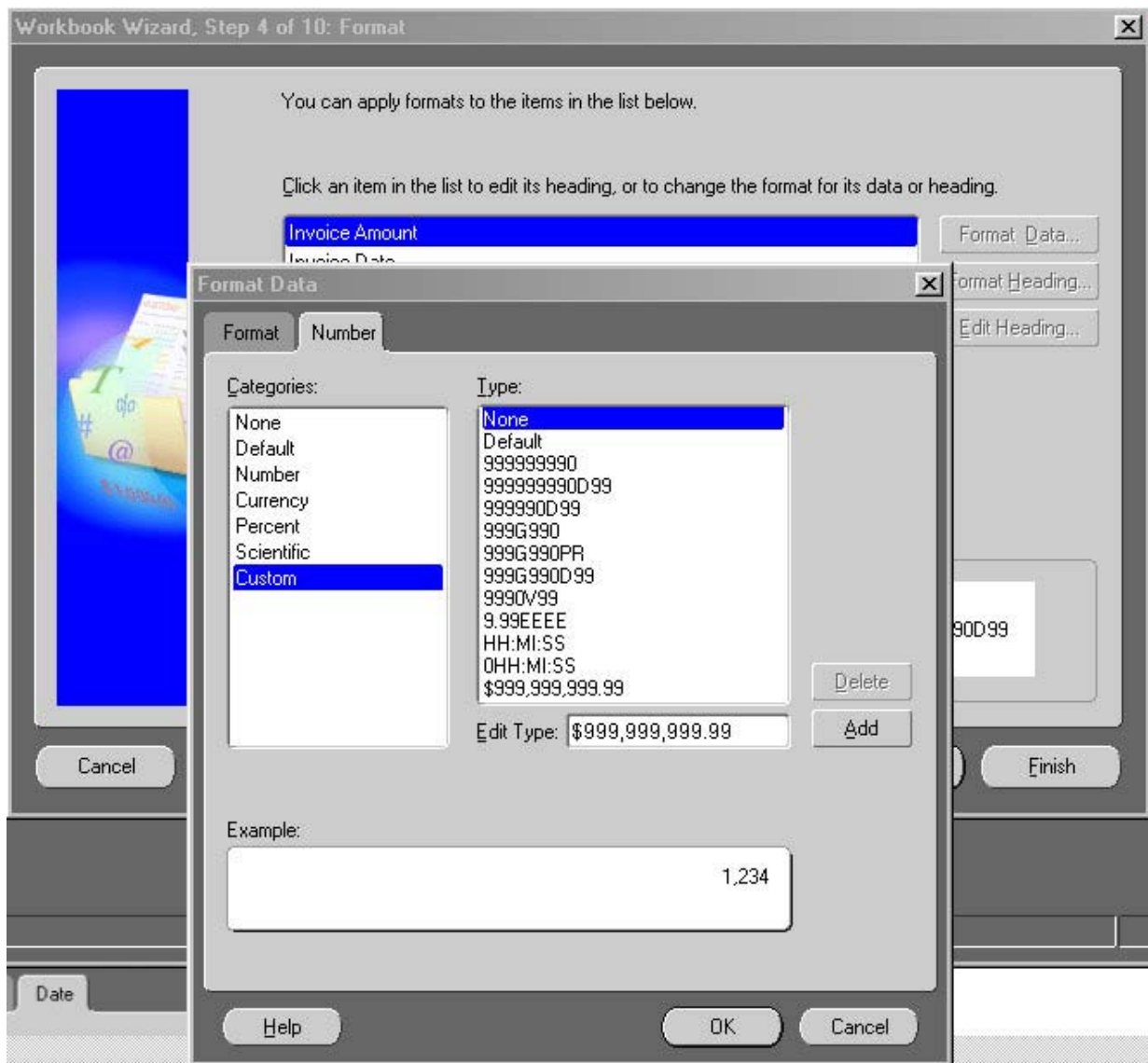
11. Select Next. Select Invoice Amount and select (B) Format Data. Select the Number Tab and then select Custom. In the Edit Type Box, type $999,999,999.99 and choose (B) Add. Select (B) OK.

Lab 1 Solutions: Creating a Table Layout Workbook with Conditions
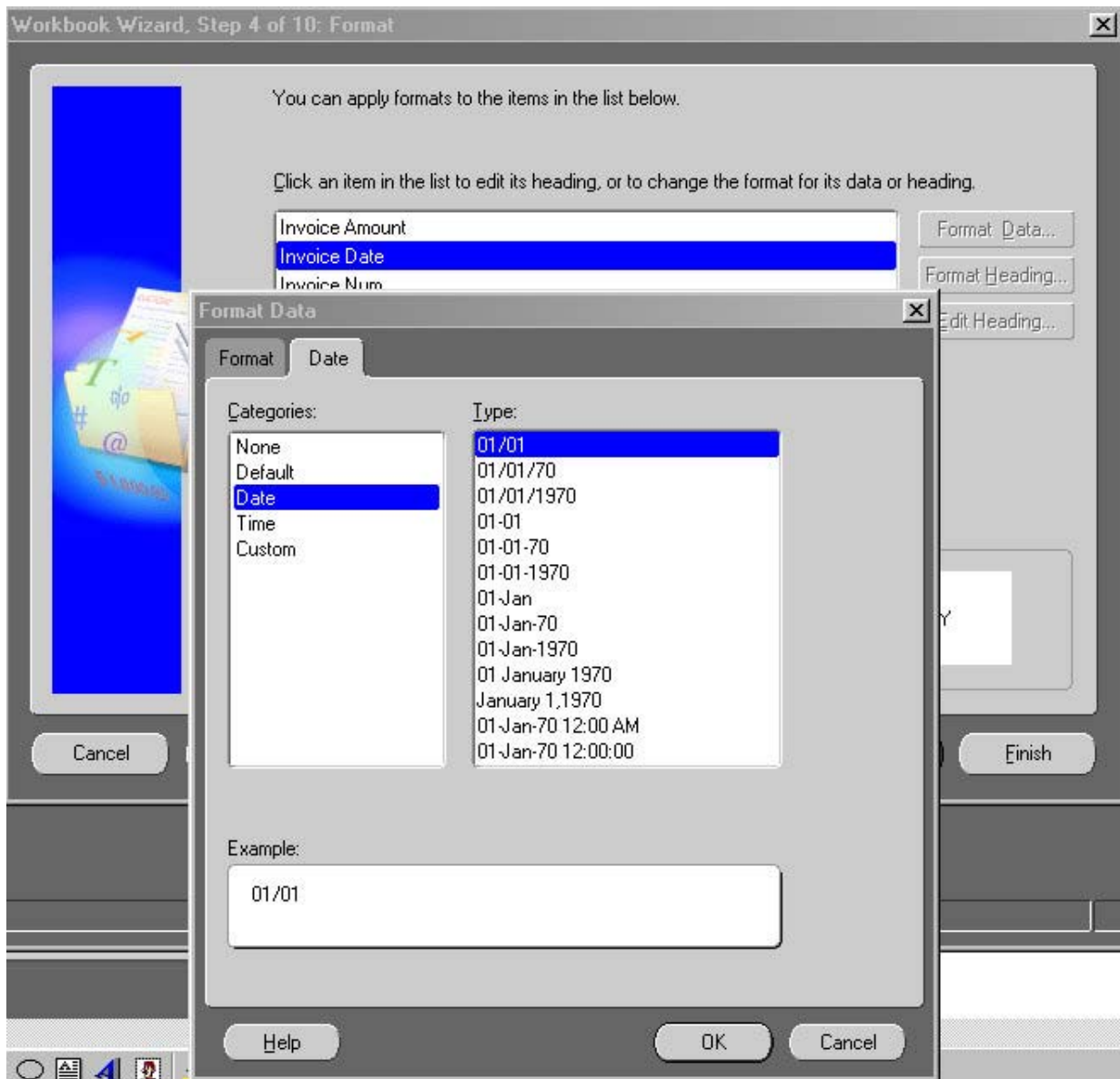
12. Select Invoice Date and choose (B) Format Data. Select the Date Tab. Select Date and choose from the list of values a Date Type of 01-Jan-1970. Select OK. Select (B) Next.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Table Layout Workbook with Conditions
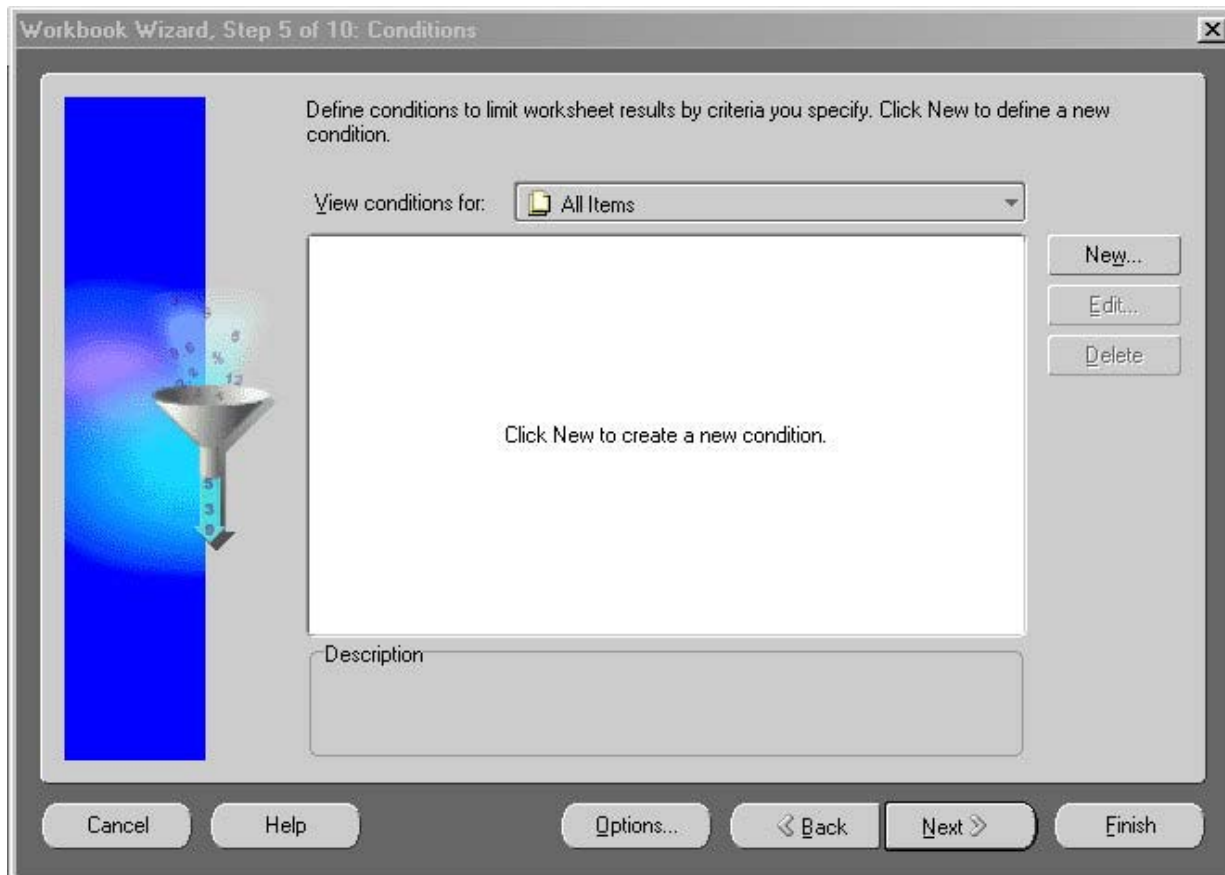
13. In the Condition window, select (B) New to add conditions to the workbook

Lab 1 Solutions: Creating a Table Layout Workbook with Conditions
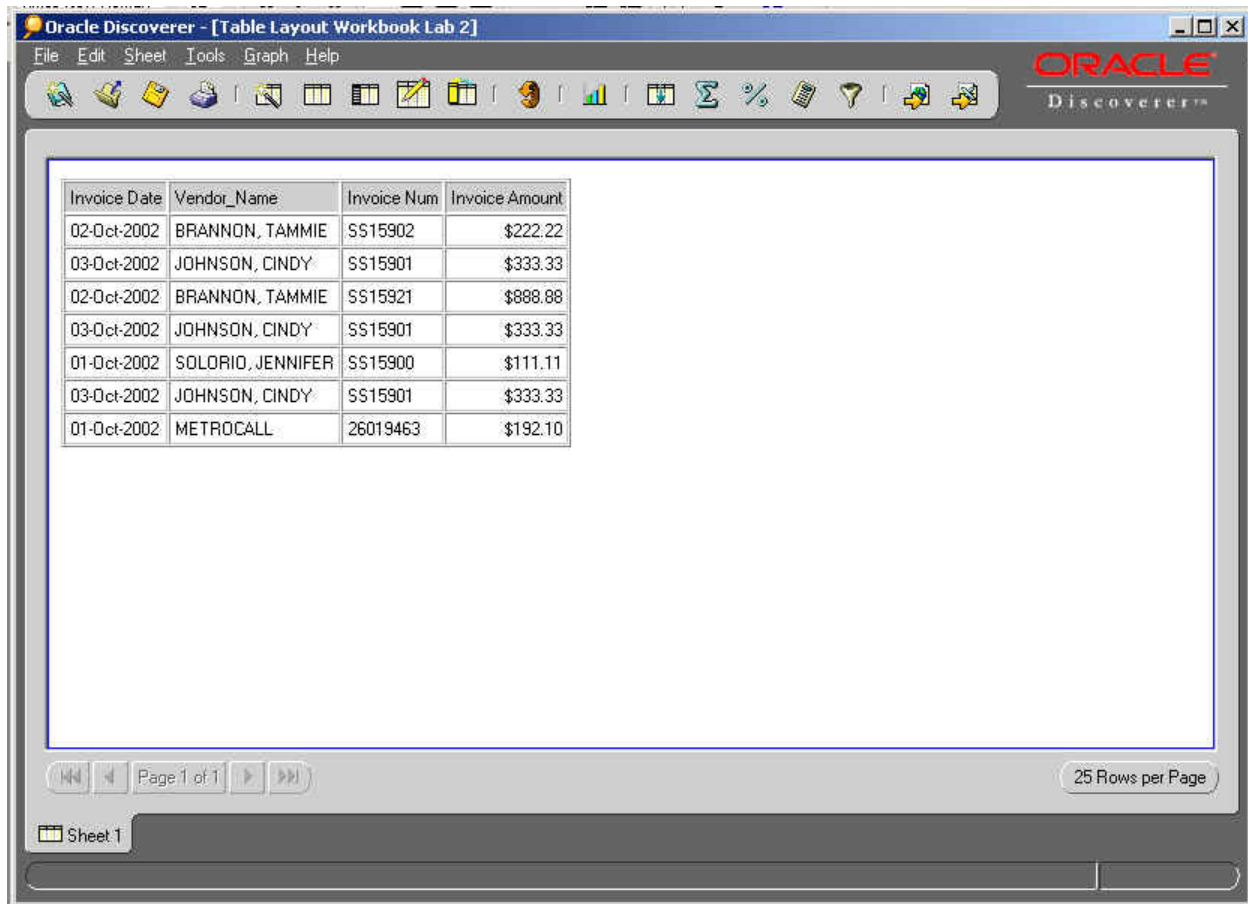
14. In the New Condition window, select "Accounts Payable-Invoice Date" from the Item dropdown menu.

15. Select "Between" from the Condition dropdown menu.

16. Under Values, type 01-OCT-2002 in the first box and 31-OCT-2003 in the second box.

17. Select (B) OK.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Table Layout Workbook with Conditions

18. Select Finish to display the final report.

19. Go to LAB2: Saving a Workbook to the Database. Do not exit the report.

Lab 2: Saving a Workbook to the Database

Instructions

You have completed your workbook and now need to save it to the database for retrieval later.

Save your workbook as XX Table Layout LAB3. XX will be your monitor number that will be assigned by your instructor.

Lab 2 Solutions: Saving a Workbook to the Database
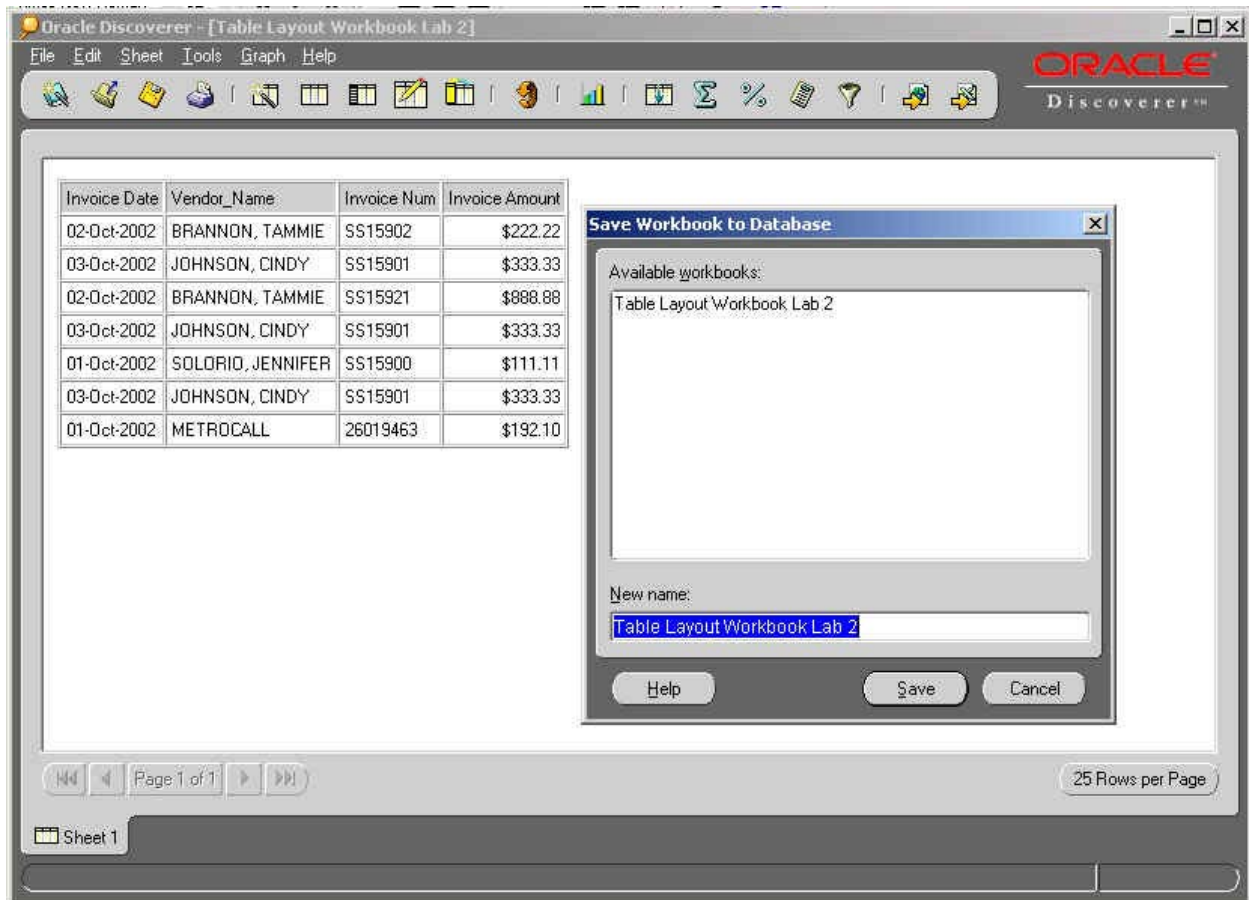
1. Select (M) File, Save As from the Menu bar.

2. Enter the name of the workbook and select (B) Save.

2. Go to LAB3: Editing the Workbook. Do not exit the report.

Using Discoverer 4i Web

Lab 3: Editing the Workbook

Instructions

You have completed your workbook but you realize that you need more data included in your worksheet.

Use the Edit Workbook Icon from the toolbar.

Add the following new data to your workbook and requery. Description, Period Name and Check Number.

Requery and resave the report with the same name.

Using Discoverer 4i Web

Lab 3 Solutions: Editing the Workbook
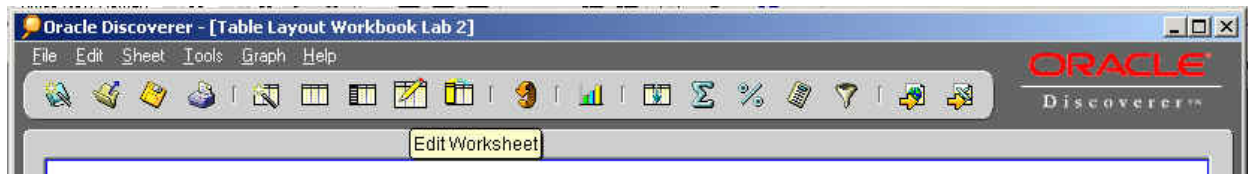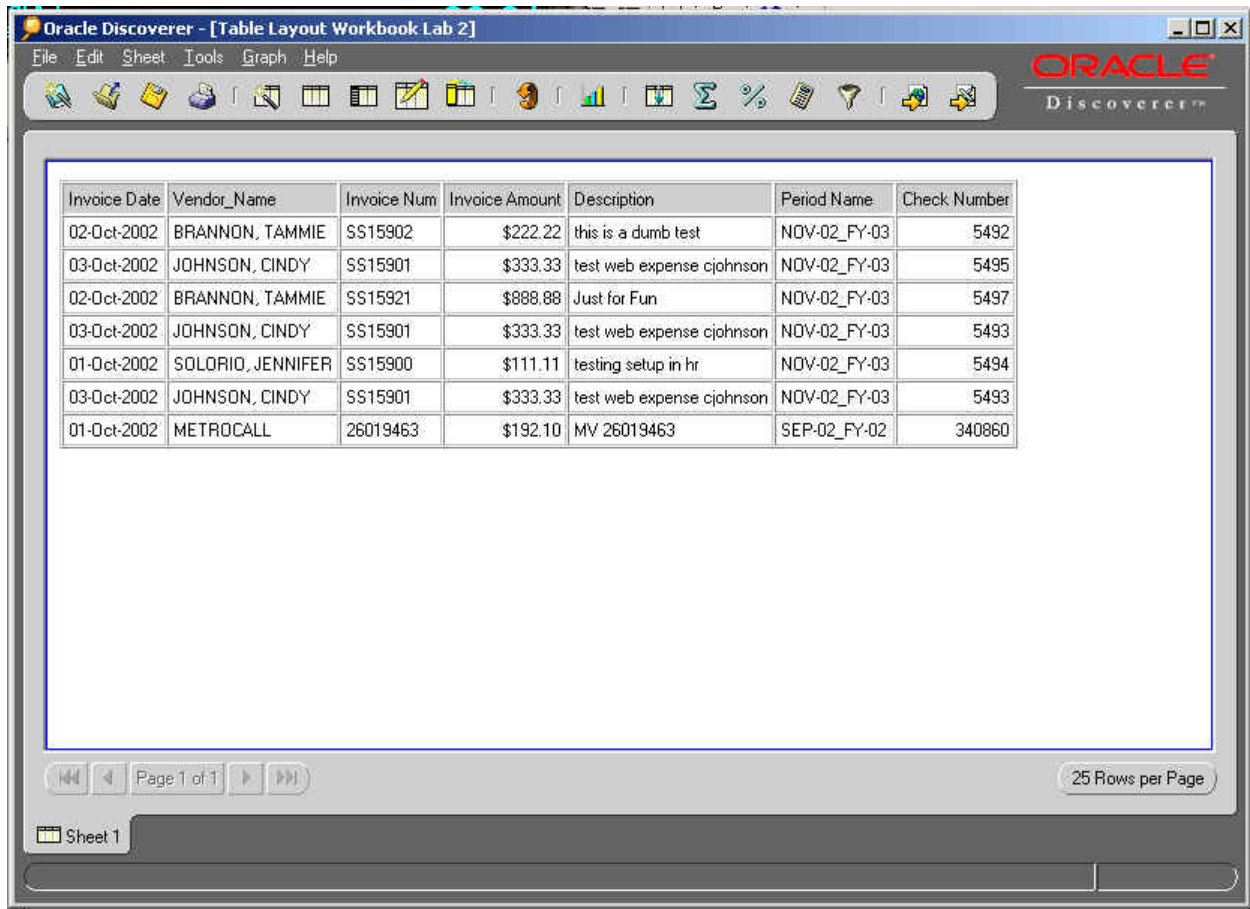
1. Select the Edit Workbook Icon from the Toolbar.
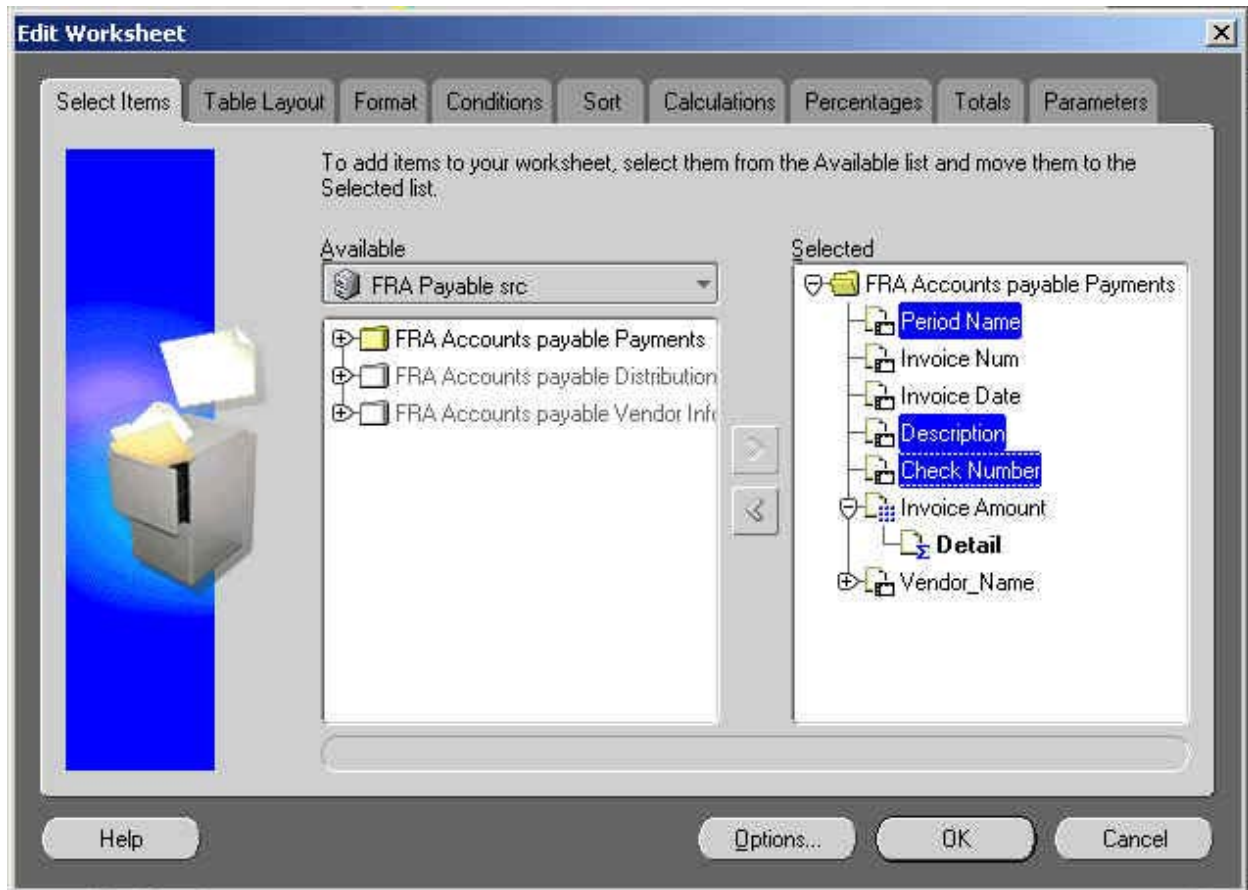
2. Choose the Select Items tab. Under the Business Area – Accounts Payable-Payments select the Description, Period Name and Check Number from the list of values.

   Hint: Choose the item and use the top → arrow key to move it from the left side to the right side.

Lab 3 Solutions: Editing the Workbook

3. Select OK to requery the report. Save with the same file name.

Lab 3 Solutions: Editing the Workbook
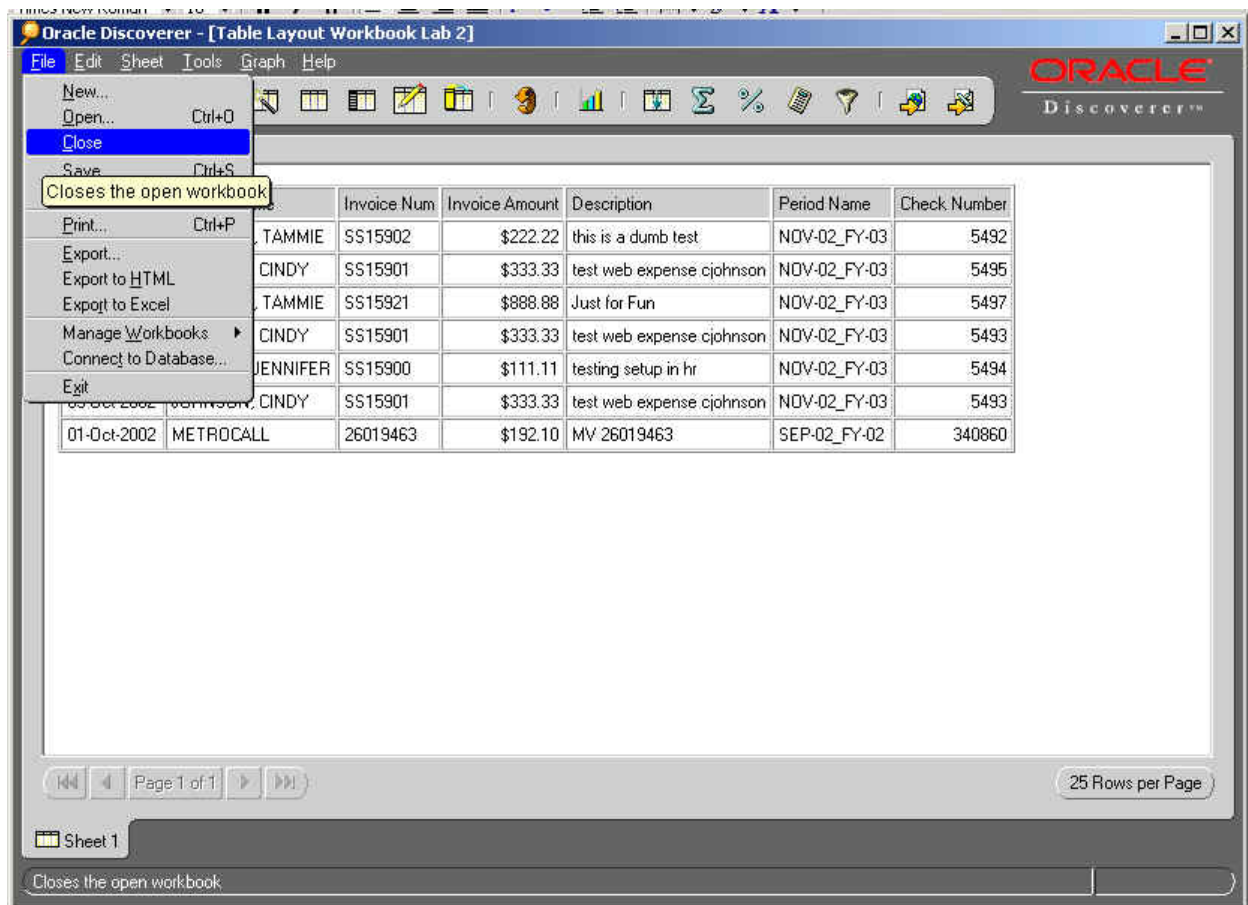
4.   Exit the report.

Calculations

Discoverer 4i Web provides the user with useful tools to create totals, percentages, calculations, parameters and conditions to ease the formatting of workbooks and worksheets.

A calculation describes an operation between items that a query requests. Calculations can be simple, such as an one to one operation between items that belong to a folder, or they can be complex mathematical or statistical expressions.

The following arithmetic operators are used in calculations:

- Multiply (*)

- Divide (/)

- Add (+)

- Subtract (-)

When you use arithmetic expressions in a calculation, the multiply and divide operators are executed first, regardless of their position in the calculation. If you have several operators that use the same precedence rule the operators are evaluated from left and right.

If you use parentheses around certain expressions they will take precedence with the operators outside of the parentheses evaluated based upon their order and then from left to right.

Example: If Price = $5.00, Quality = 100 and Discount = $.10 then for the following equation Quantity*Price-Discount the answer would be $490.90. However, if the same equation were to be written this way Quantity-(Price-discount) the answer would be $490.00.

Creating Calculations

> Oracle Discoverer
>
> N → Create/Open Workbook
>
> Connect to Oracle Discoverer

1. In the Connect to Oracle Discoverer window, enter requested information.
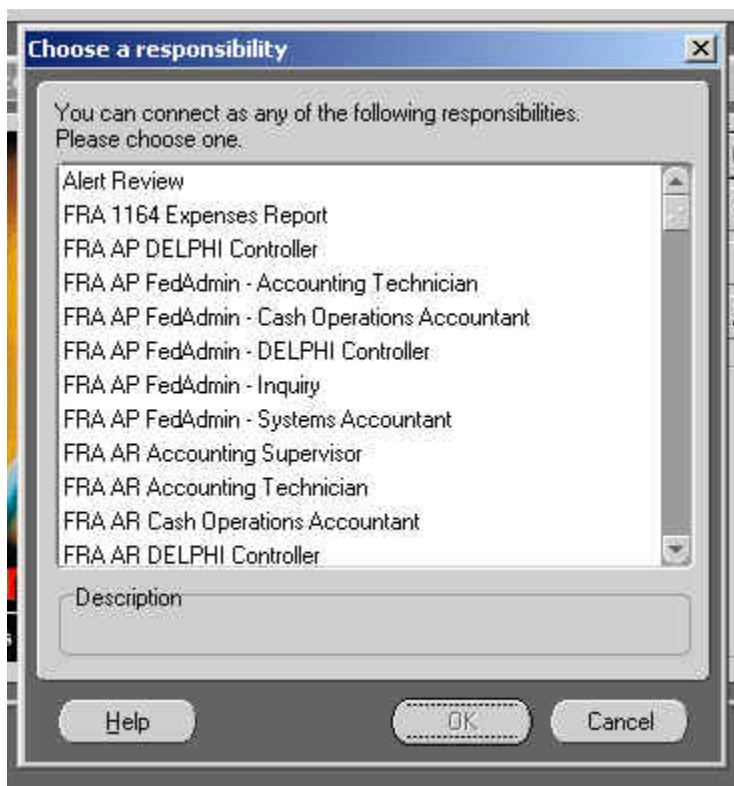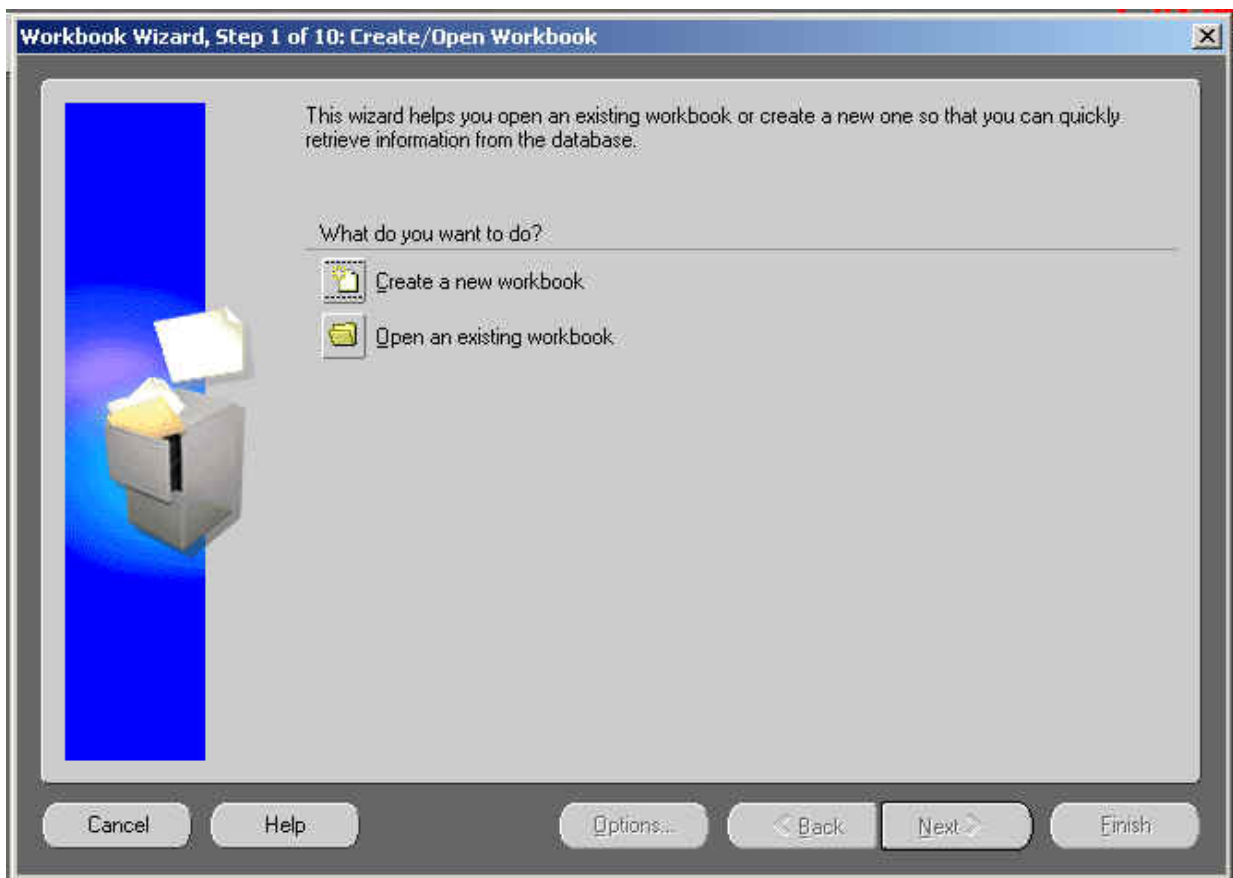
Choose a responsibility

You can connect as any of the following responsibilities. Please choose one.

- Alert Review
- FRA 1164 Expenses Report
- FRA AP DELPHI Controller
- FRA AP FedAdmin - Accounting Technician
- FRA AP FedAdmin - Cash Operations Accountant
- FRA AP FedAdmin - DELPHI Controller
- FRA AP FedAdmin - Inquiry
- FRA AP FedAdmin - Systems Accountant
- FRA AR Accounting Supervisor
- FRA AR Accounting Technician
- FRA AR Cash Operations Accountant
- FRA AR DELPHI Controller

Description

Help   OK   Cancel

2.   Select a responsibility.

3. Select the Open an existing workbook icon and select the Database option.

4. Select the desired workbook from the list of values.

Using Discoverer 4i Web
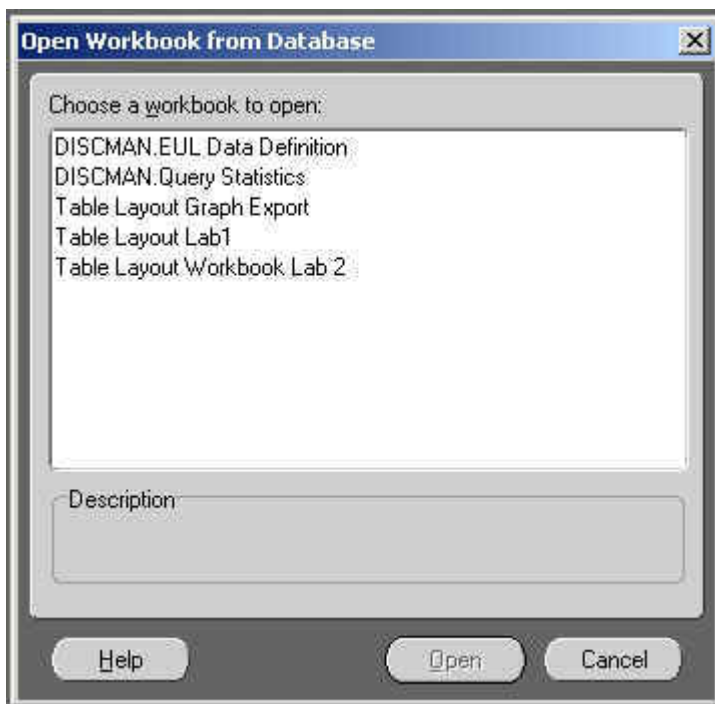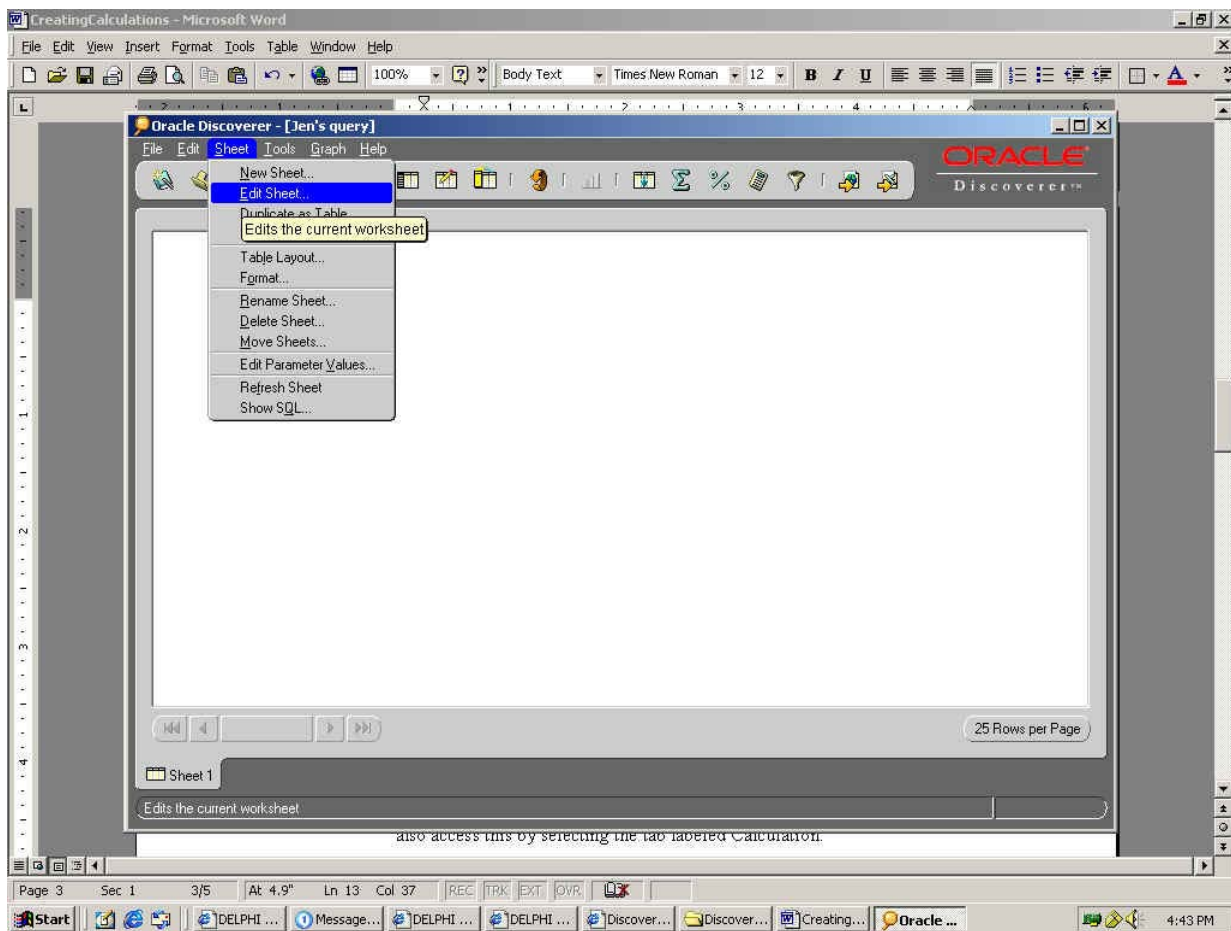
5. Select (M) Sheet → Edit Worksheet from the menu or Select the Edit Worksheet icon

     from the Toolbar.
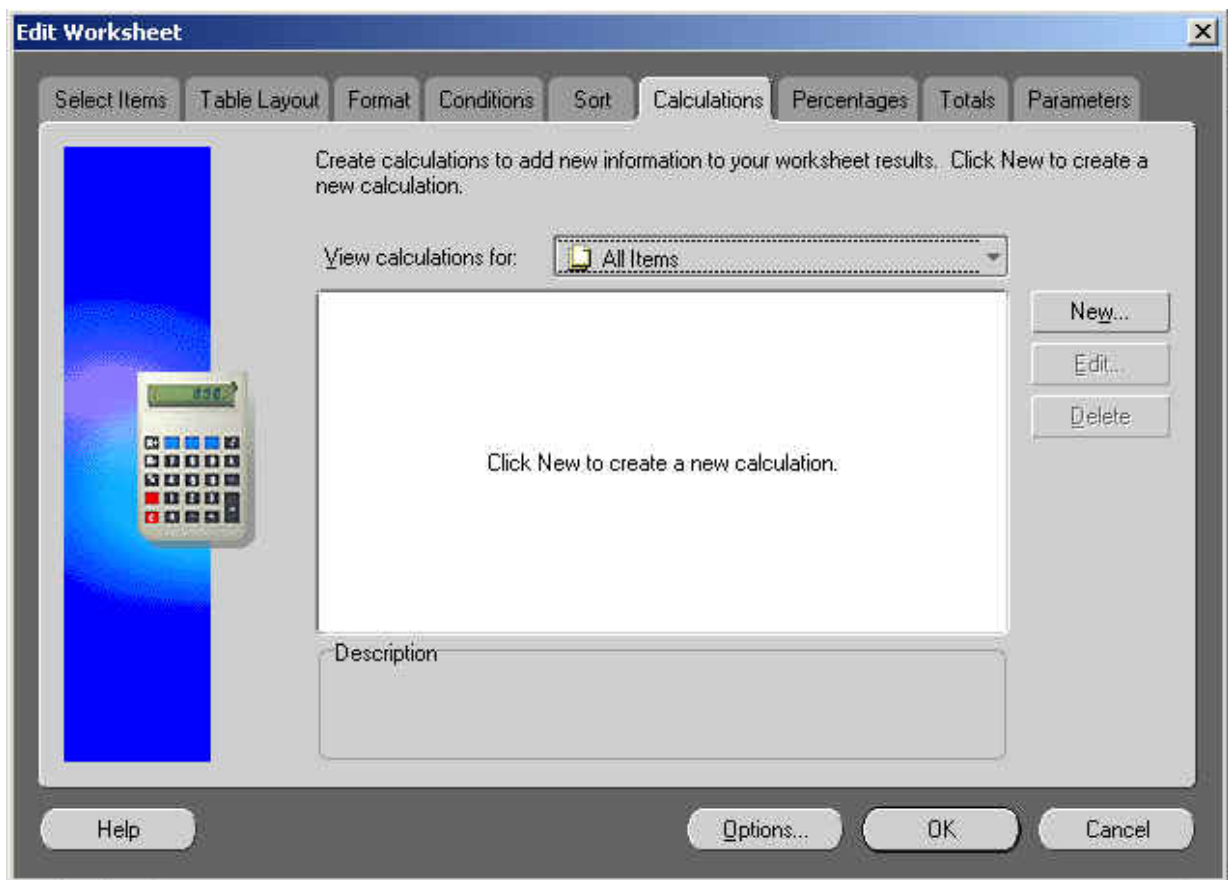
6. Select the Calculations from the heading in the Edit Worksheet dialog box.

7. Select (B) New to create a new calculation, (B) Edit if you are editing a previous calculation or (B) Delete to remove a previous calculation.

8. Select (B) New to display the New Calculation Form.

Using Discoverer 4i Web
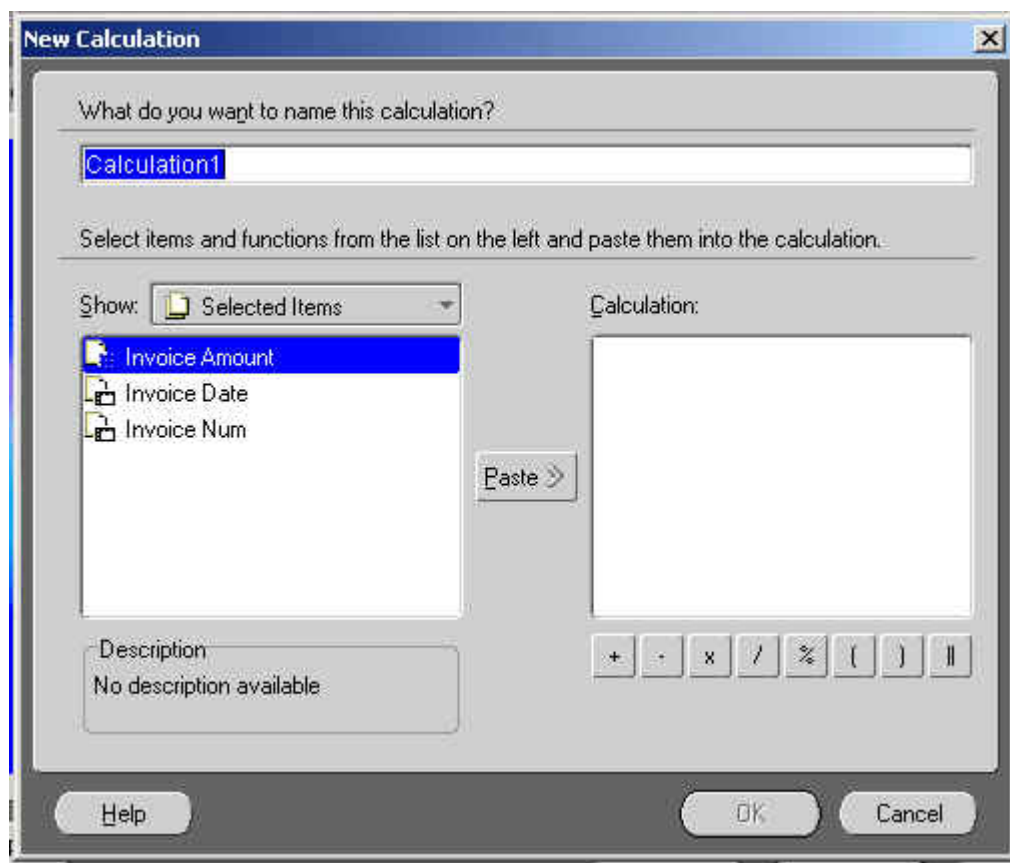
9.   Enter a name for your calculation.
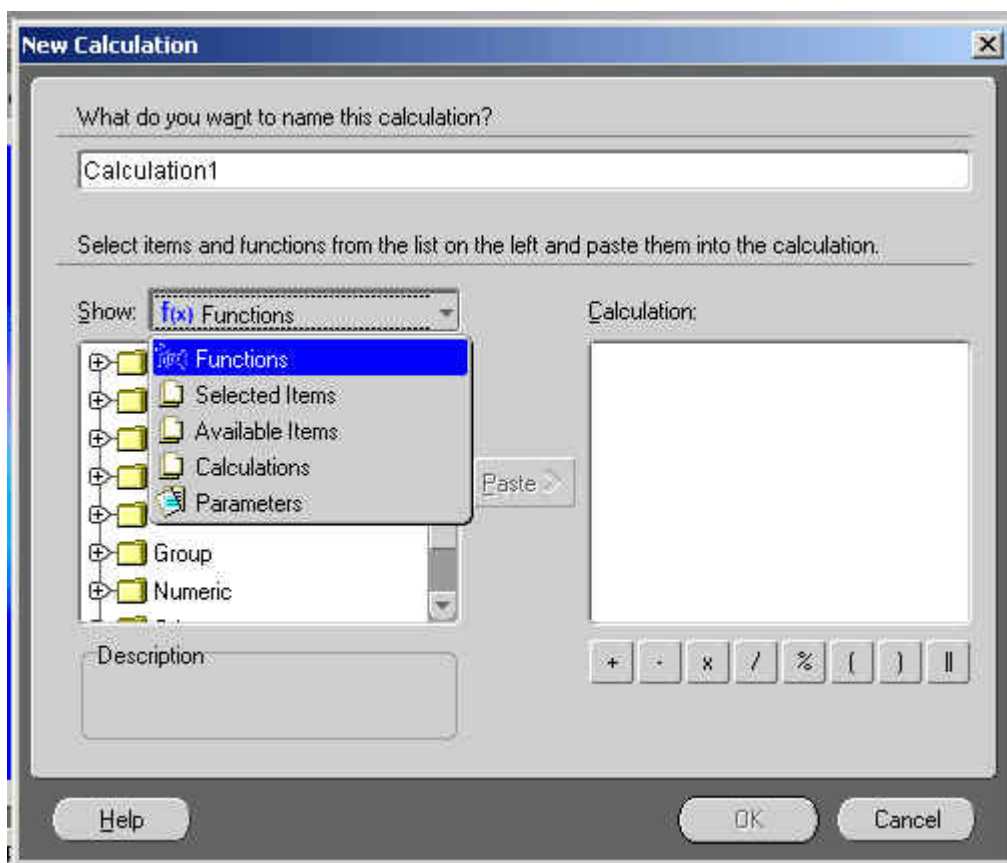
10. Select item and functions from the list on the left and select (B) Paste to move to the right.
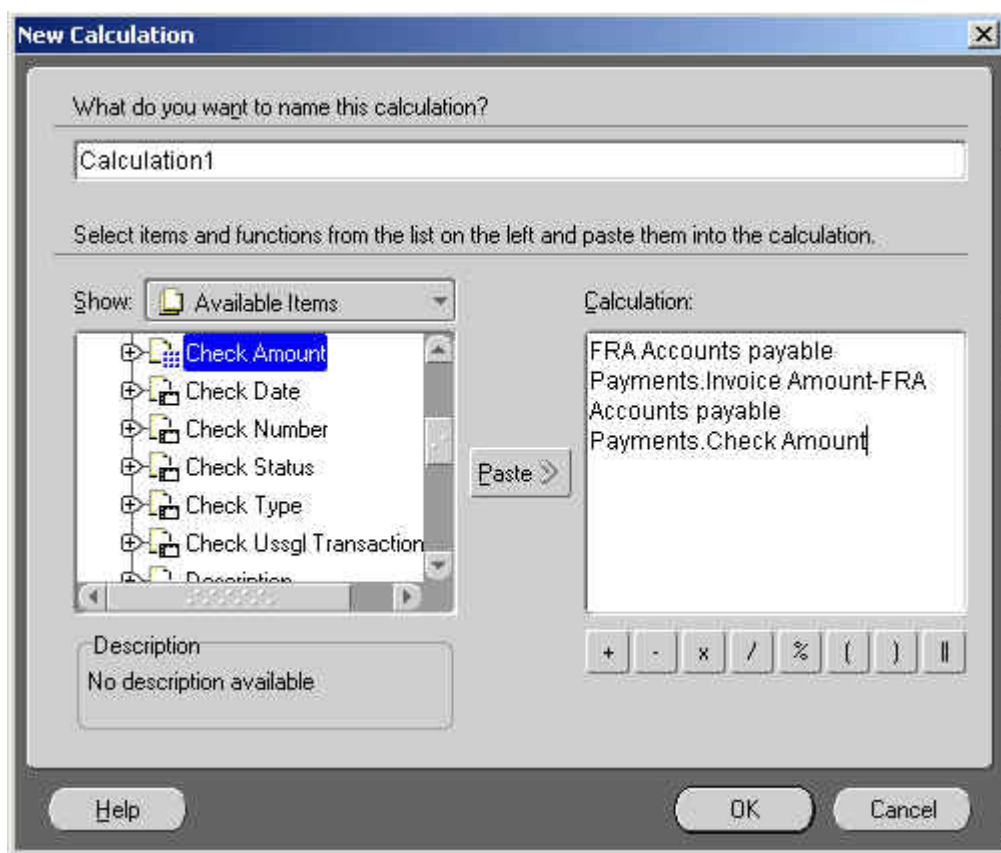
11. Select (B) OK to return to the Edit Worksheet main screen.

12. Select (B) OK to allow the worksheet to be required and display the updated information.

Creating a Parameter
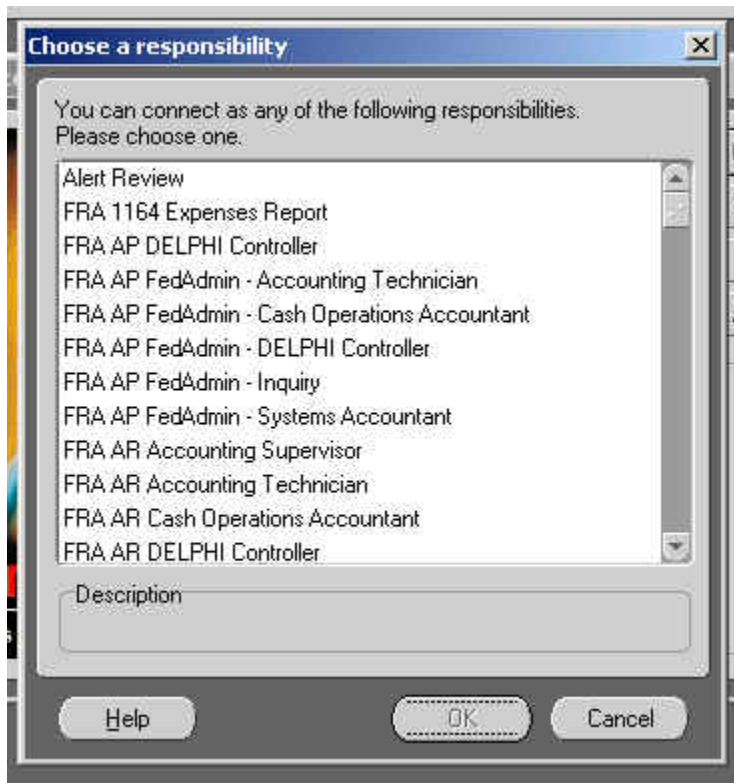
Oracle Discoverer
N → Create/Open Workbook
Connect to Oracle Discoverer

1. In the Connect to Oracle Discoverer window, enter the requested information.

Using Discoverer 4i Web

2. Select a responsibility.
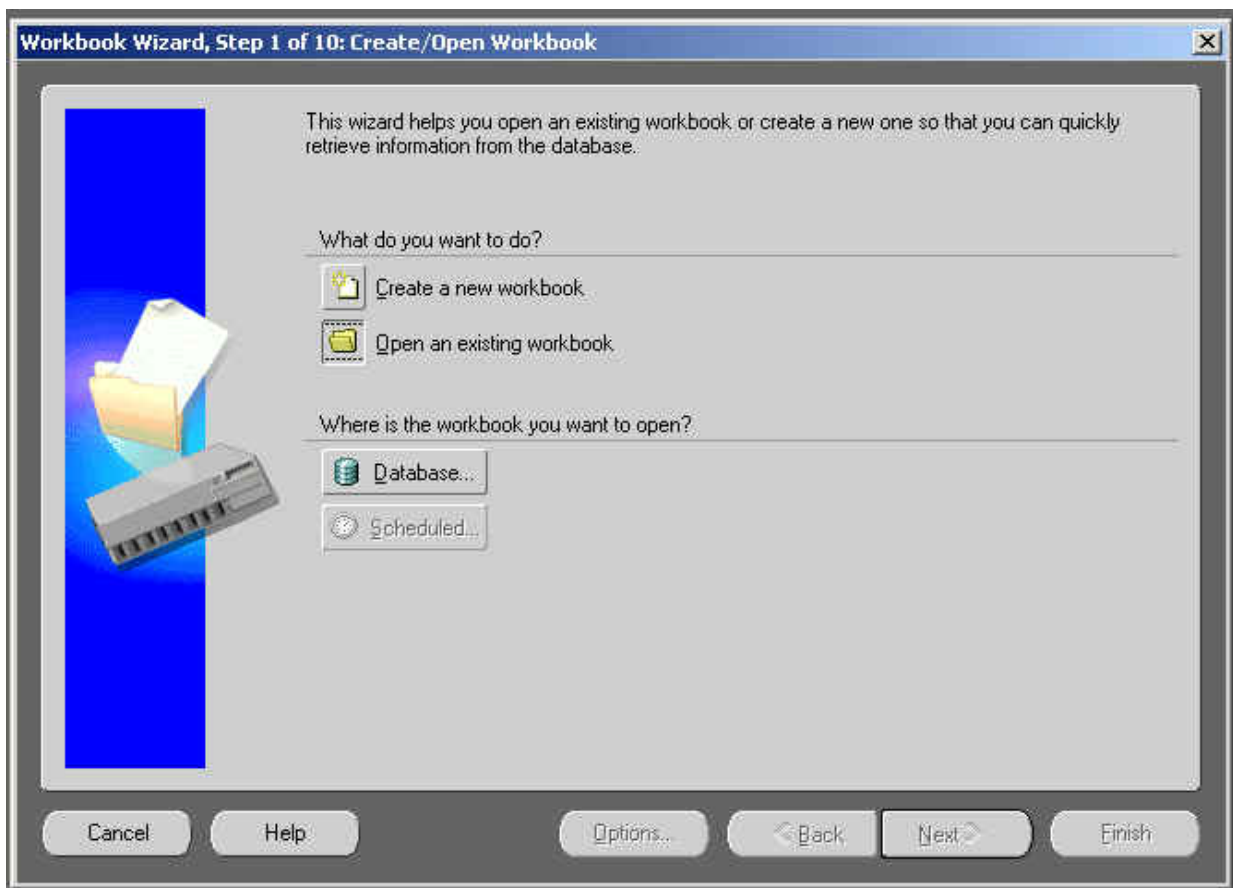
3. Select on the Open an Existing Workbook and select the Database option.
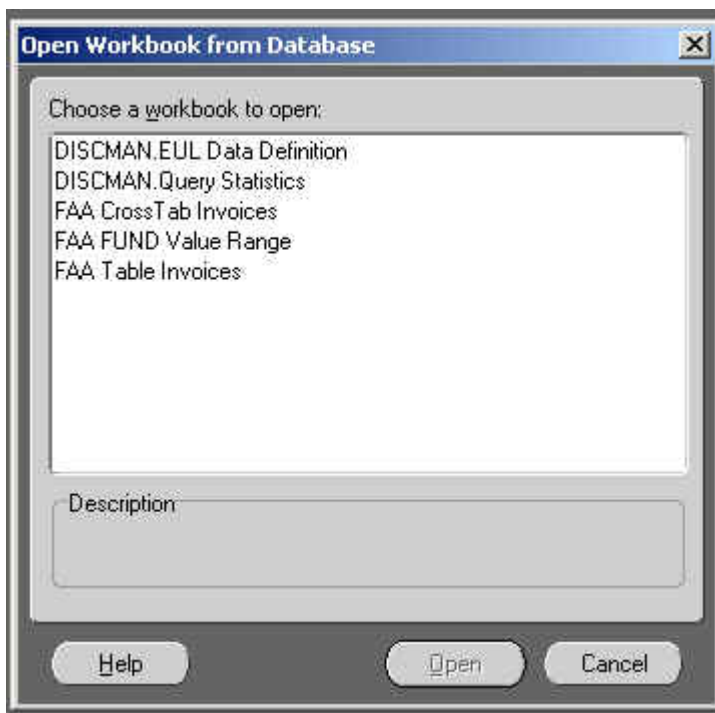
4. Select the desired workbook from the list of values.

5. Select (B) Open to display the Workbook.
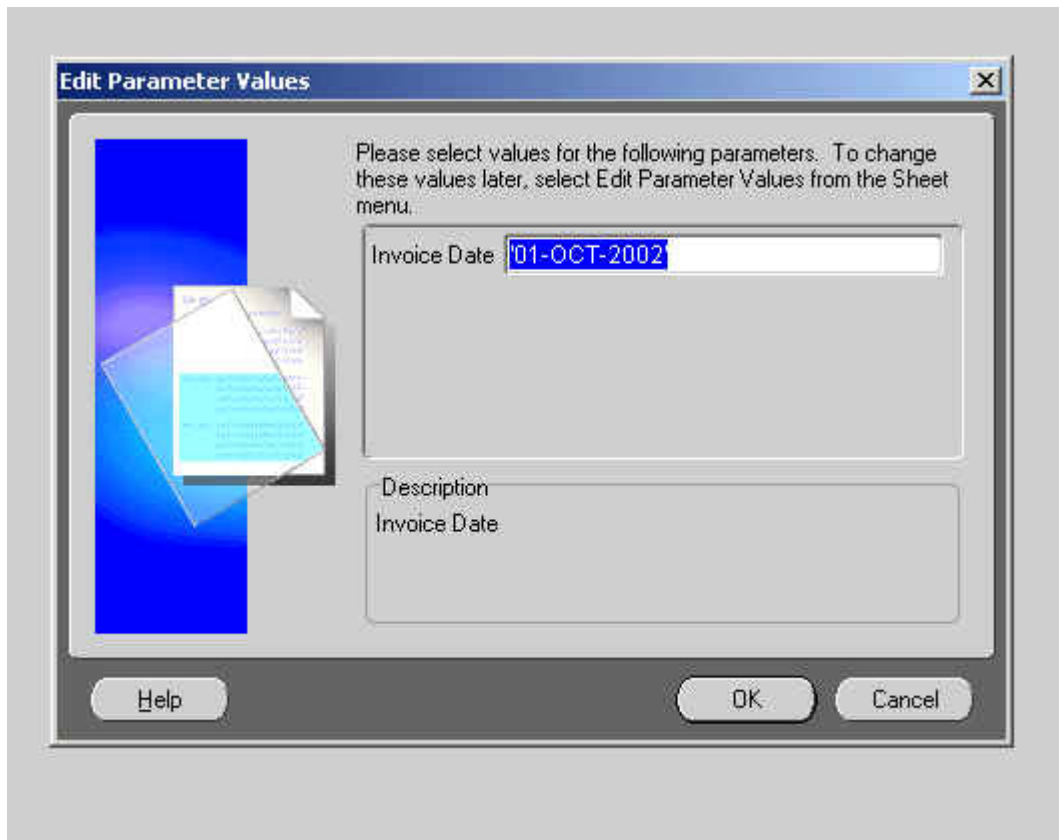
6. If a workbook contains a worksheet that has been parameterized, the Edit Parameter Values dialog box automatically appears when opening an existing report. Select (B) OK.

   Note: A parameter is a value within a condition that you specify when you run a query.
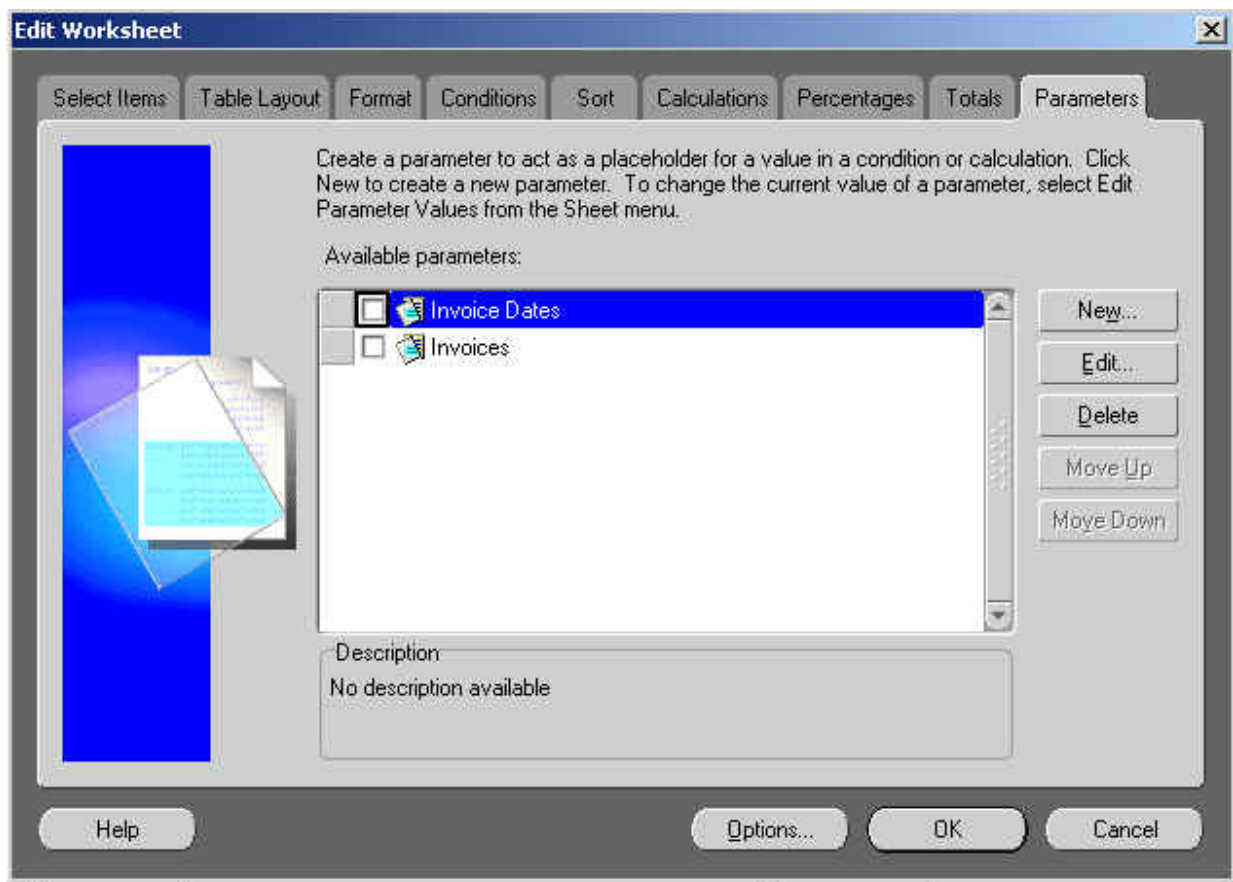
7. Select (M) Tools: Parameters. The Parameters Tab in the Edit Worksheet Wizard is displayed.

8. Select the (B) New. The New Parameter dialog box is displayed.

9. Enter the Parameter Name.

10. Select the item for the parameter. You can select an item from the dropdown list of values.

11. Enter the prompt for the user.

12. Enter a description for the parameter, if required.

13. The "What is the value of this parameter if it is used in more than one sheet?" option allows you to crate the Parameter either at Workbook level or Worksheet level. Select "Allow only one value for all sheet" to make the parameter value cascade across all worksheets in the workbook.

14. Select "Allow a different value in each sheet" to make the parameter value apply to the current worksheet only.

15. If you want to create a condition with this parameter, select the Create Condition checkbox. The "Use Operator" dropdown list enables you to select an operator for the condition. The condition created will appear in the list of conditions on the Conditions Tab of the Edit Worksheet Wizard.

16. Select (B) OK to display your new parameter.
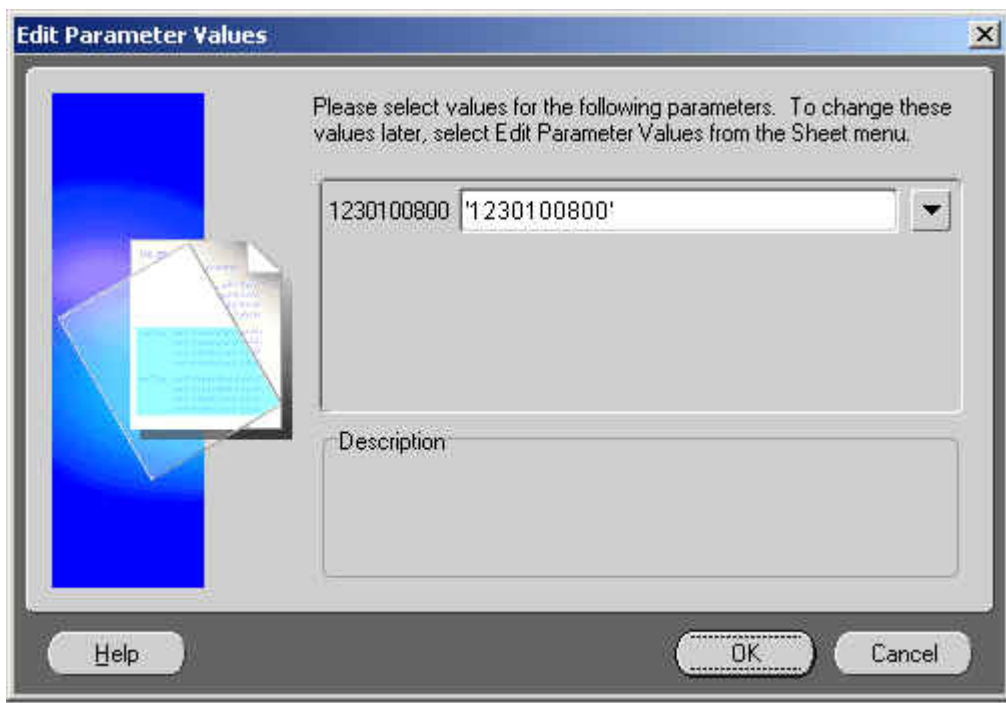
17. Select (B) OK to display the Edit Parameter Values dialog box.
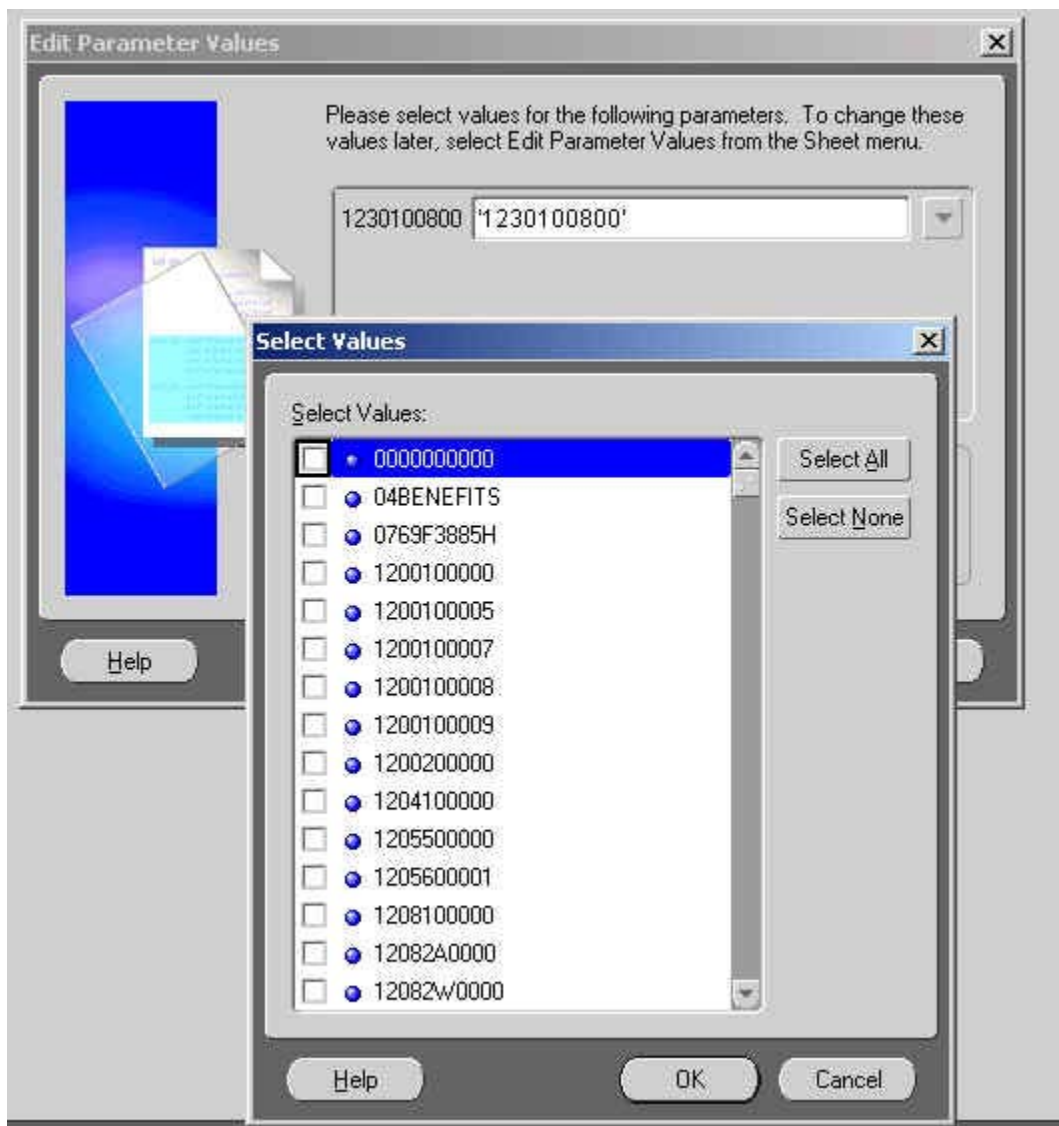
18. Enter the required value. Select the down arrow for a complete list of values as shown below.

Note: Once you have chosen to display your new parameter your worksheet will requery the data as you have specified. The parameter will limit the query to what ever you have mandated.

Using Discoverer 4i Web

Creating Totals

Oracle Discoverer

N → Create/Open Workbook

Connect to Oracle Discoverer

1. Enter Username, Password, and Database.

Using Discoverer 4i Web
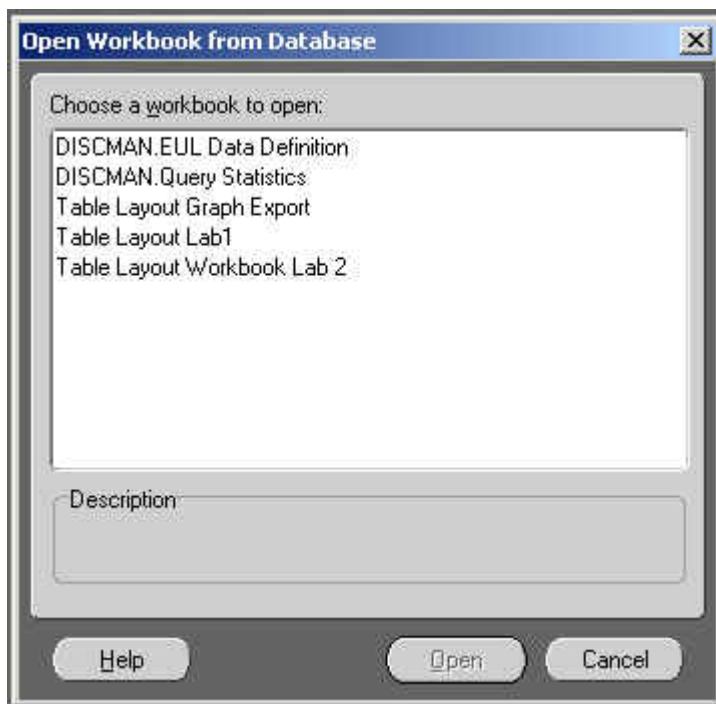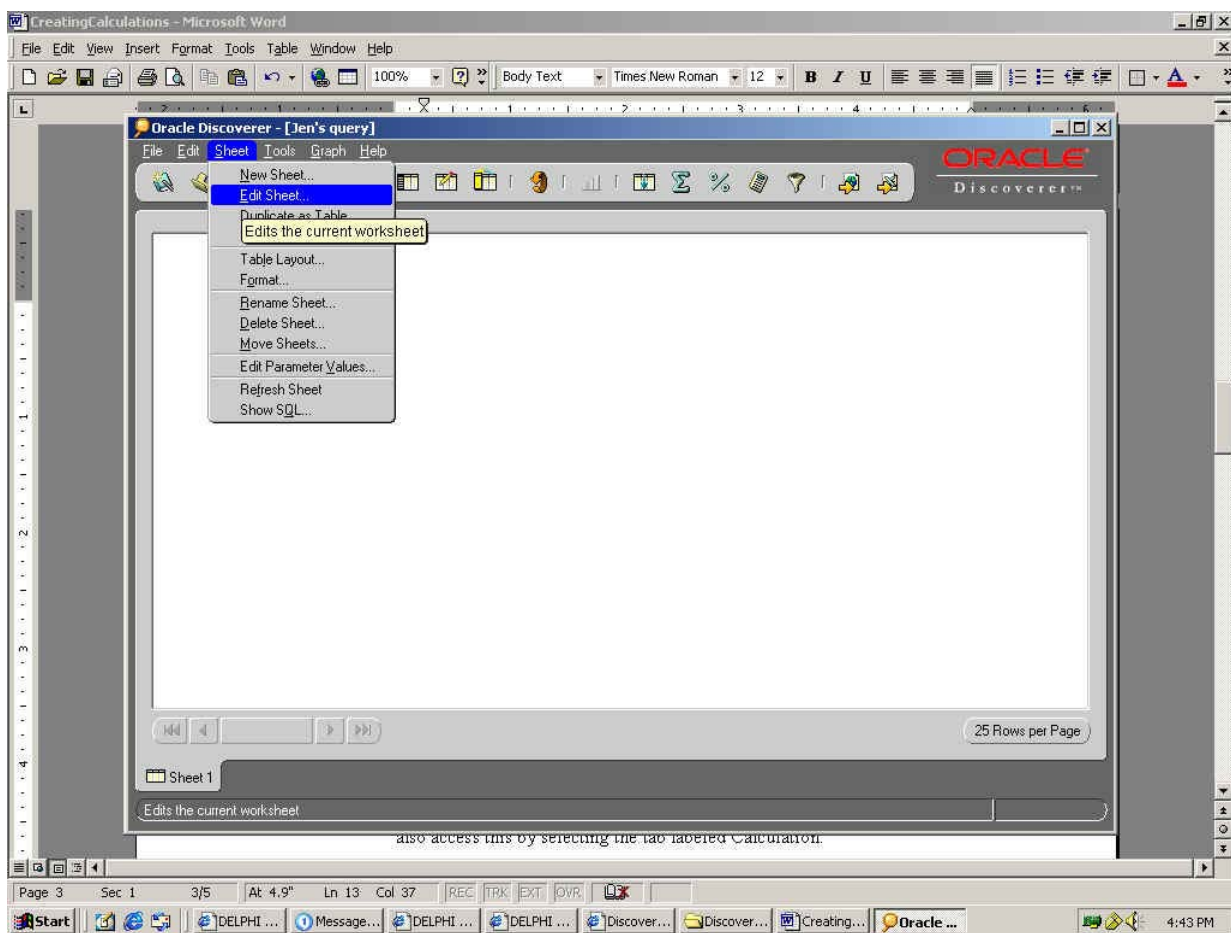
2. Select the appropriate responsibility from the list of values

3. Select the Open an existing workbook icon and select the Database Option.

Using Discoverer 4i Web
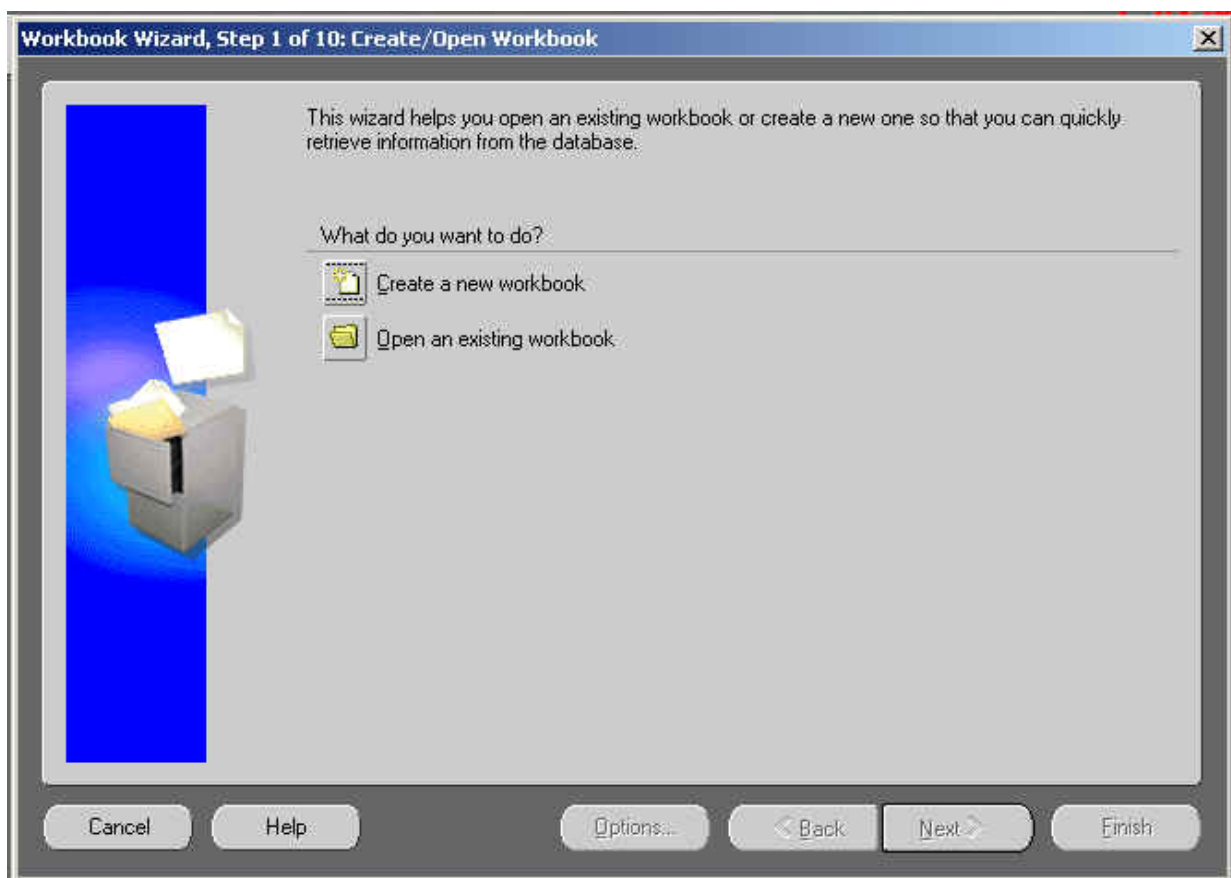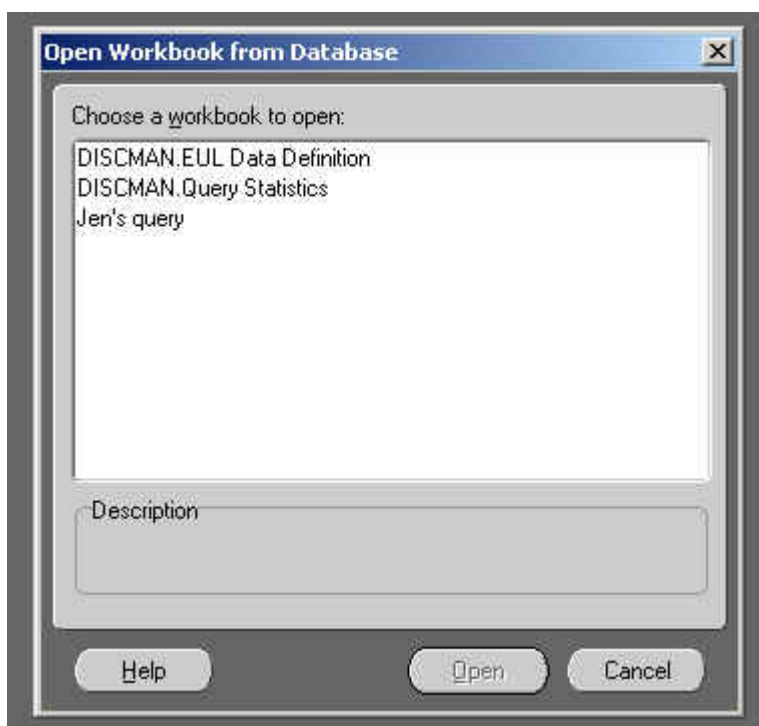
4. Select the desired workbook from the list of values.
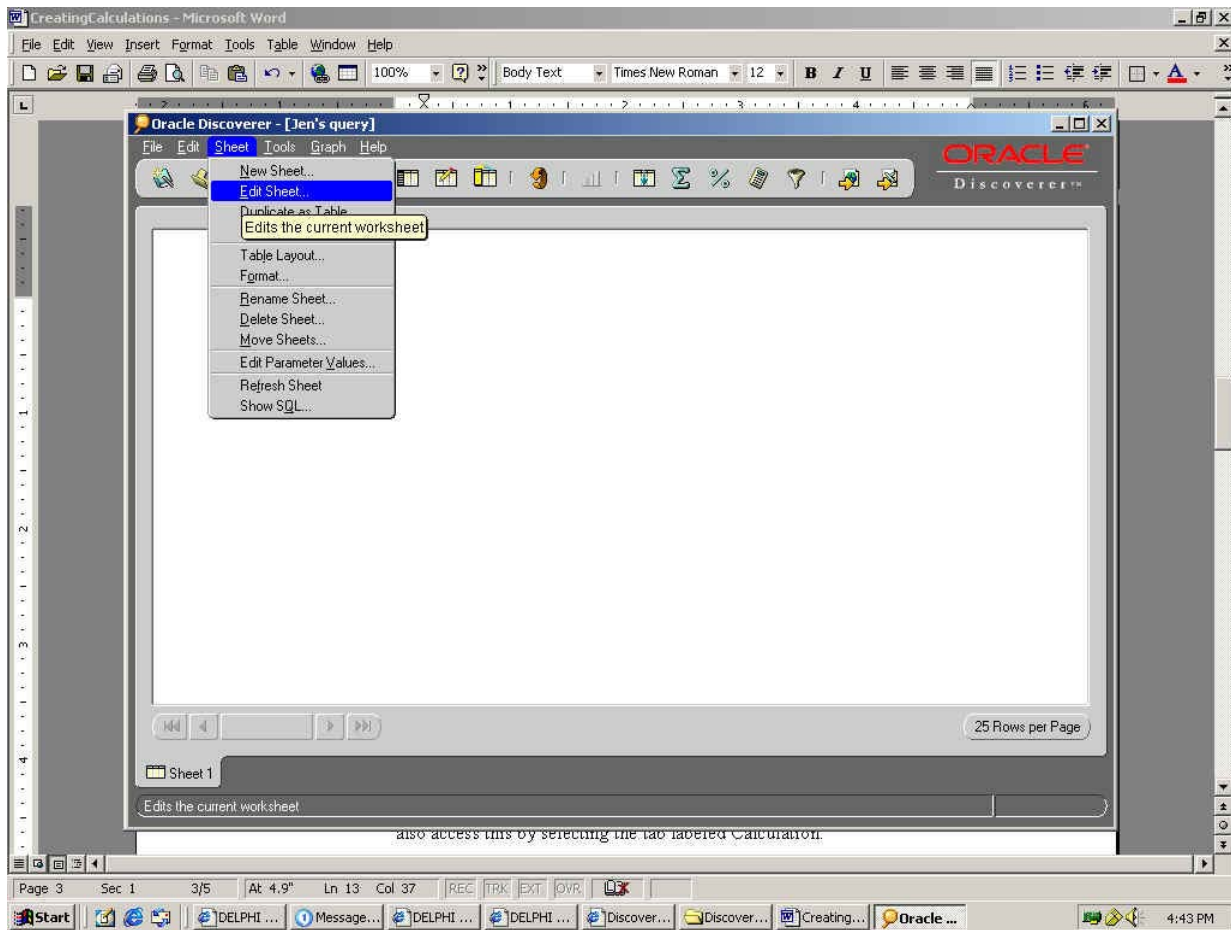
5. Select (M) Sheet: Edit Sheet or select the Edit Worksheet icon from the toolbar. The Edit Worksheet window will appear.

Using Discover 4i Web
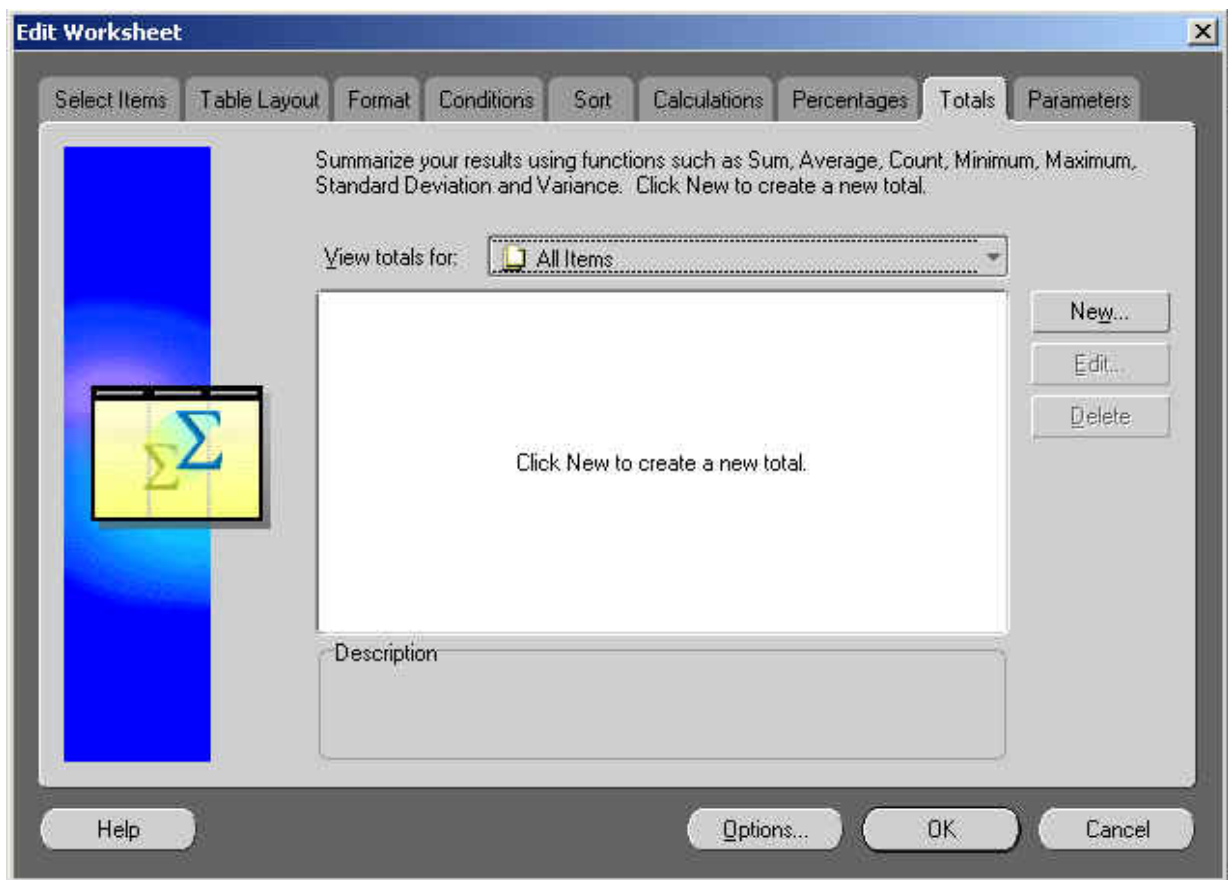
6. Select the Totals Tab.

7. Select (B) New to create a new total. The (B) Edit changes the existing calculation and the (B) Delete deletes the existing Total.

8. Select a Data Point from the dropdown menu of what you would like to create a Total on.

9. Select from the dropdown menu the kind of total you want. Some examples are:

    - Sum Distinct: Adds all unique values.

    - Average Distinct: Adds all unique values and divides by the number of values.

    - Standard Deviation Distinct: Calculate the variance using unique values.

    - Variance Distinct: Calculates the percentages of the grand total of the row or column using unique values.

10. Select either the Grand Total at bottom or Subtotal at each change radio button to determine how your total is to be shown.

11. To eliminate each row having a total amount, select the Don't display totals for a single row box.

12. Select either Calculate totals only for current page items or Calculate totals for all page items radio button.

13. Select either the Generate label automatically checkbox or select an item from the dropdown menu.

14. Select (B) Format Data to make changes to the font, numbering colors, etc.

15. Select the (B) OK when you have finished. The worksheet will requery to display edited information.

Using Discoverer 4i Web

Creating Percentages

Oracle Discoverer
N → Create/Open Workbook
Connect to Oracle Discoverer

1. Enter Username, Password, and Database.

2.   Select the appropriate responsibility from the list of values.
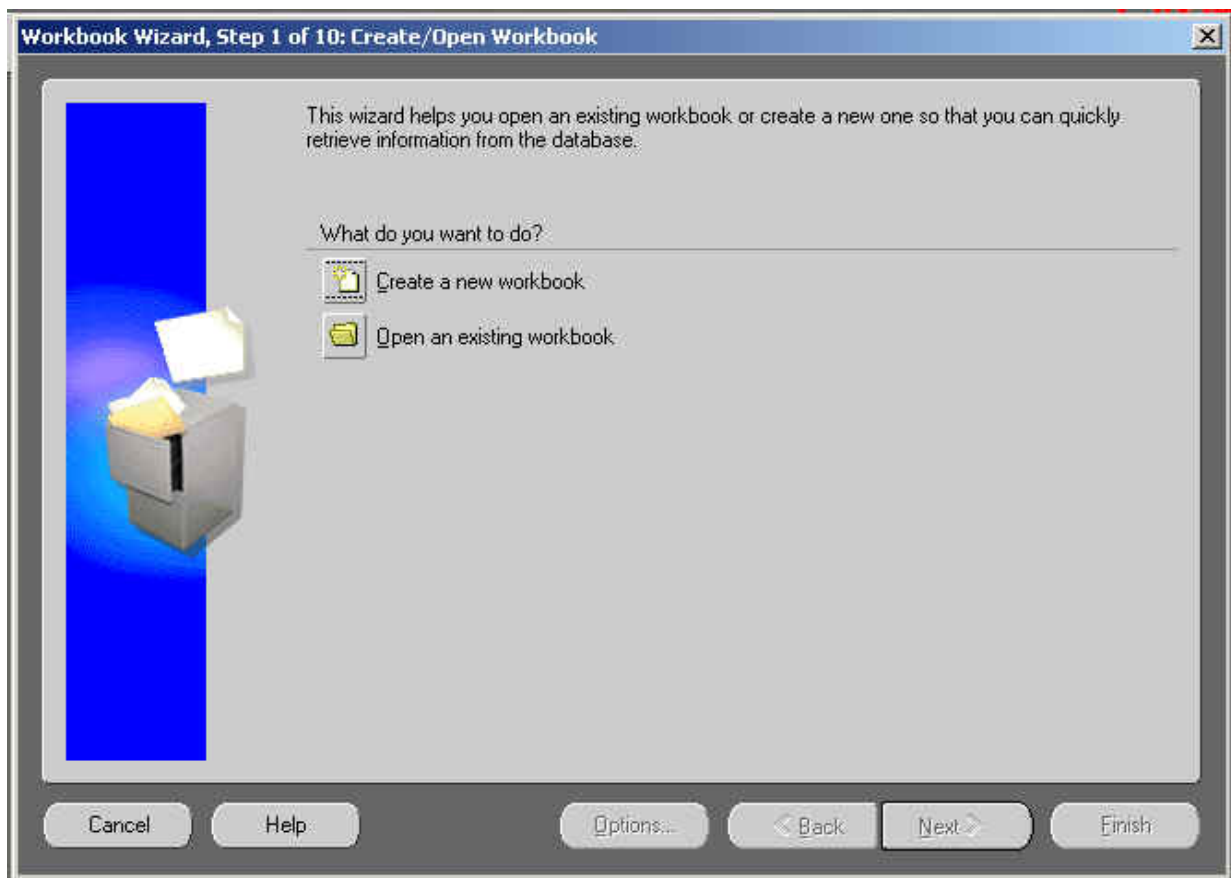
3. Select the Open an existing workbook icon and select the Database Option.

4. Select the desired workbook from the list of values.

5. Select (M) Sheet: Edit Sheet or select the Edit Worksheet icon from the toolbar.

Using Discoverer 4i Web
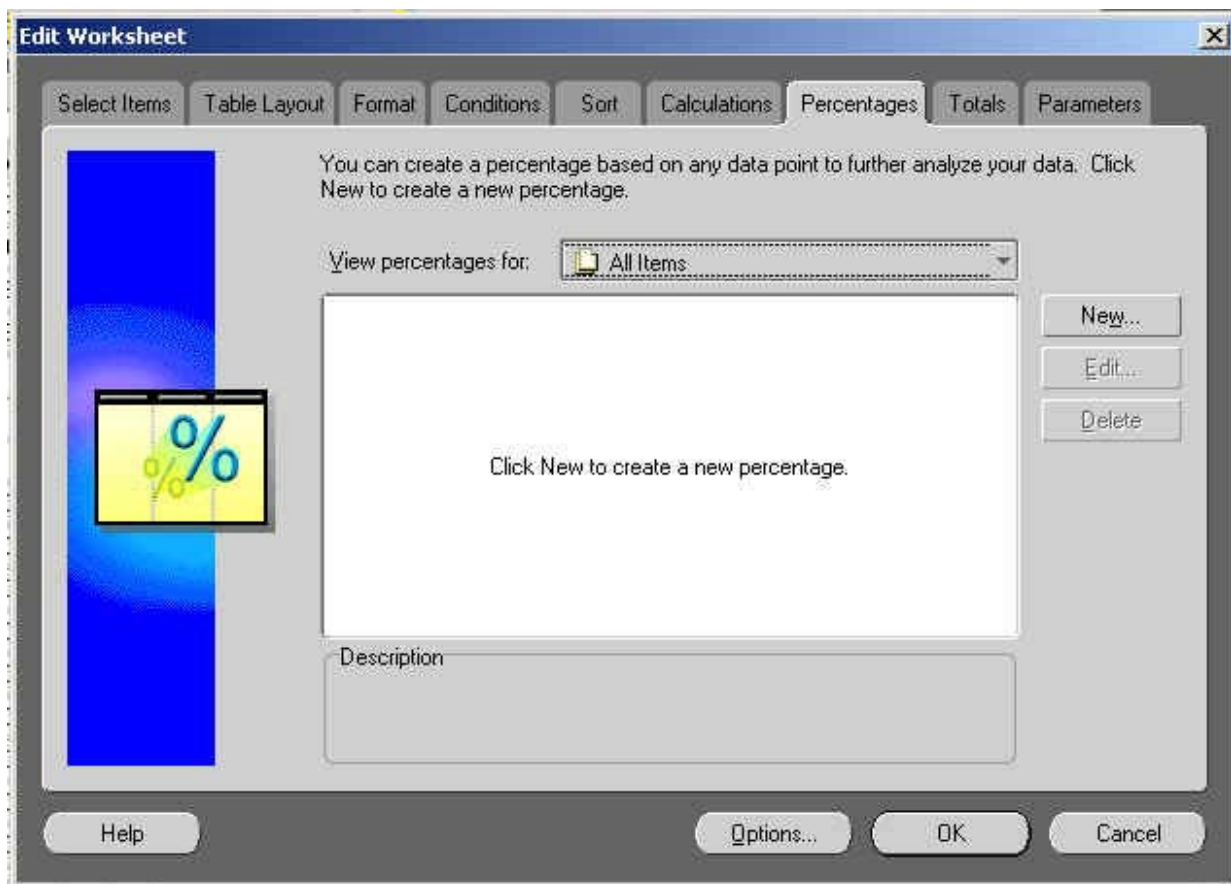
6. Select the Percentages Tab from the Edit Worksheet window.

7. Select (B) New to create a new percentage, (B) Edit to change the existing calculation or (B) Delete to delete the existing calculation. Using this tool you can calculate percentage contribution of a value to the total or by a grouping.

Using Discoverer 4i Web

8. The first field available is a Percent Title field so that you may label the percentage that you are about to create. This allows for ease in selection of percentages in case you create more than one percentage and want to vary your results.

9. The second field is the item from which your percentage will be based upon. Select the item from the dropdown list. You may then select to calculate the percentage contribution of a value to the total or by a grouping. If you choose to subgroup the total, use the dropdown to determine the Total Grouping.

10. You man then choose to calculate the percentage for each page of the report or for the report in total. The final field is a Column title for the percent calculation.

11. When you have finished making the percentage selections, select (B) OK.

Using Discoverer 4i Web
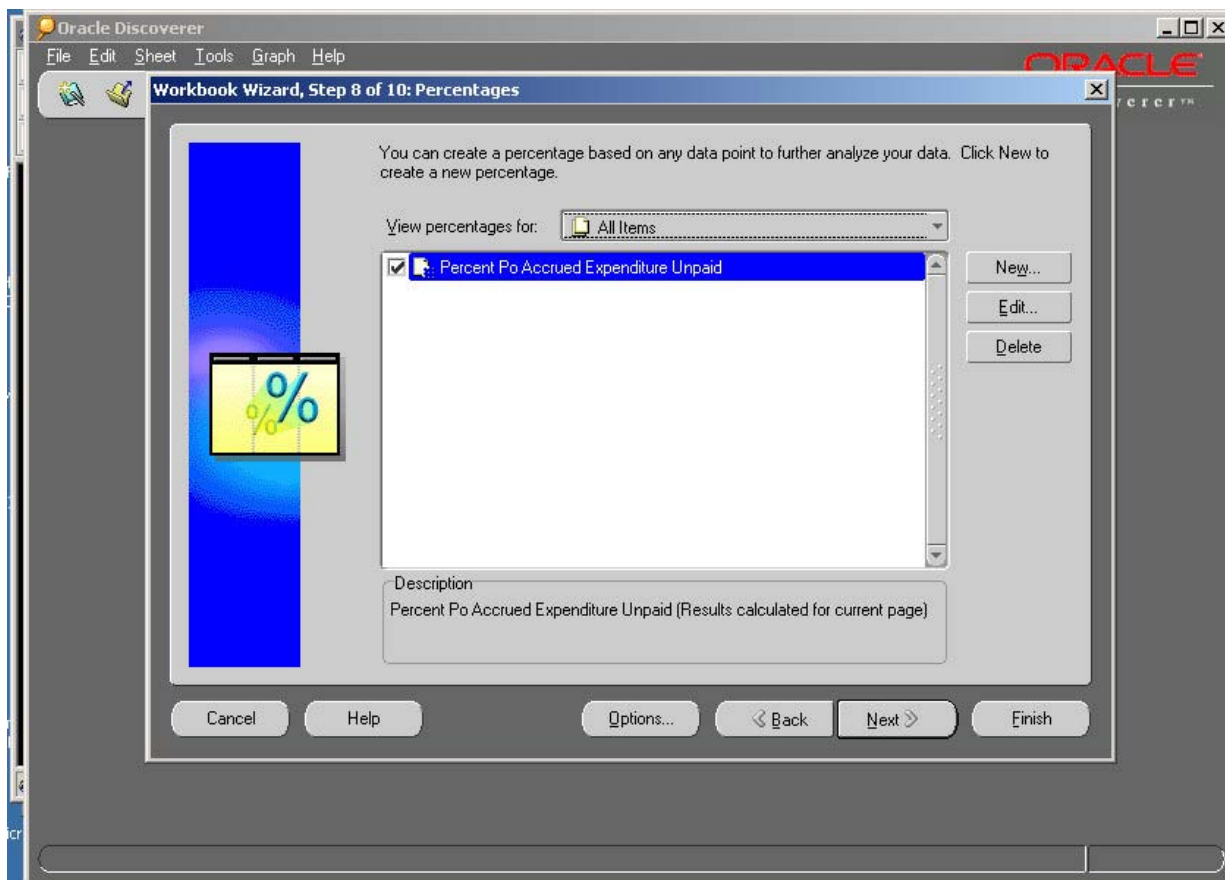
12. The percentage that you have entered will have the box to the left of the title checked. It is here that you may select as few or as many percentages to be performed against this worksheet as you require. It is also from this screen that you will select (B) New if you need to create an additional percentage. Select (B) Edit if you need to modify your percentage or the (B) Delete if you no longer wish to have the percentage selected as a possible function against your query.

Using Discoverer 4i Web

Lab 1: Creating a Page Detail Report Using Functions

Instructions

You need to create a new Page Detail Table Layout Report that contains from the Fdm PO Docs Business Area: Po Number, Period Name, Authorization Status, Cancel Flag, Closed Code, Vendor Name, Invoice Number, and PO Obligation Detail.

Displayed as follows:

PO Number in Column 1

Data to displayed gridlines

PO Number Sorted Low to High

Exclude all Purchase Orders that are not in a status of Approved.

Exclude all canceled Purchase Orders.

Calculate paid amounts of Purchase Orders.

Calculate the Unpaid Purchase Orders vs Purchase Orders Obligations.

Total on the Amount of Total Purchase Orders entered for a specified period.

Lab 1 Solutions: Creating a Page Detail Report Using Functions

1.   Access the Discoverer 4i Web tool and select Start.

N → Internet Explorer
http://discoverdelphi.dot.gov:7779/discwb4/html/english.ms_ie/start/ie.htm

Lab 1 Solutions: Creating a Page Detail Report Using Functions

2.   Enter Username, Password, and Database assigned by the instructor.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Page Detail Report Using Functions

3.   Select the Training Responsibility assigned by the instructor.

Using Discoverer 4i Web
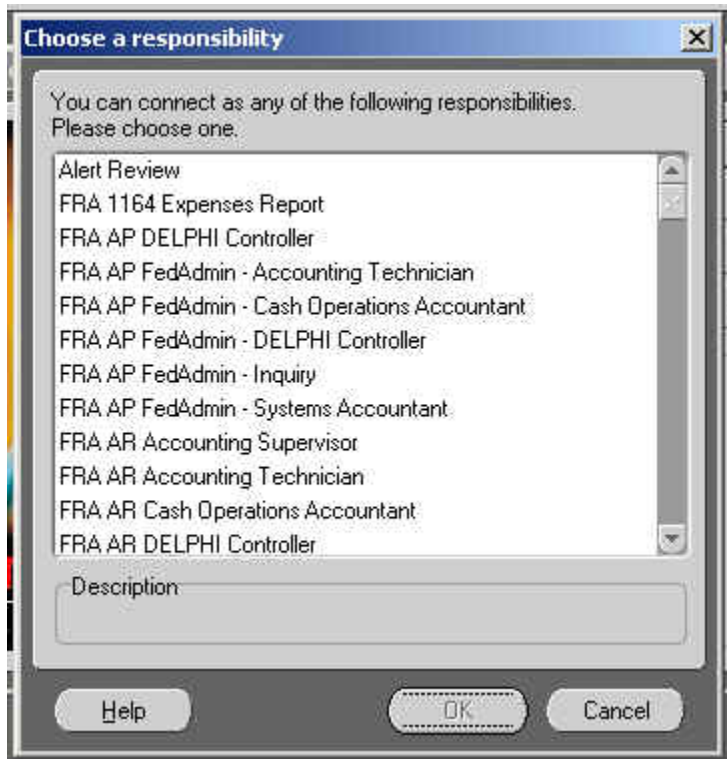
Lab 1 Solutions: Creating a Page Detail Report Using Functions
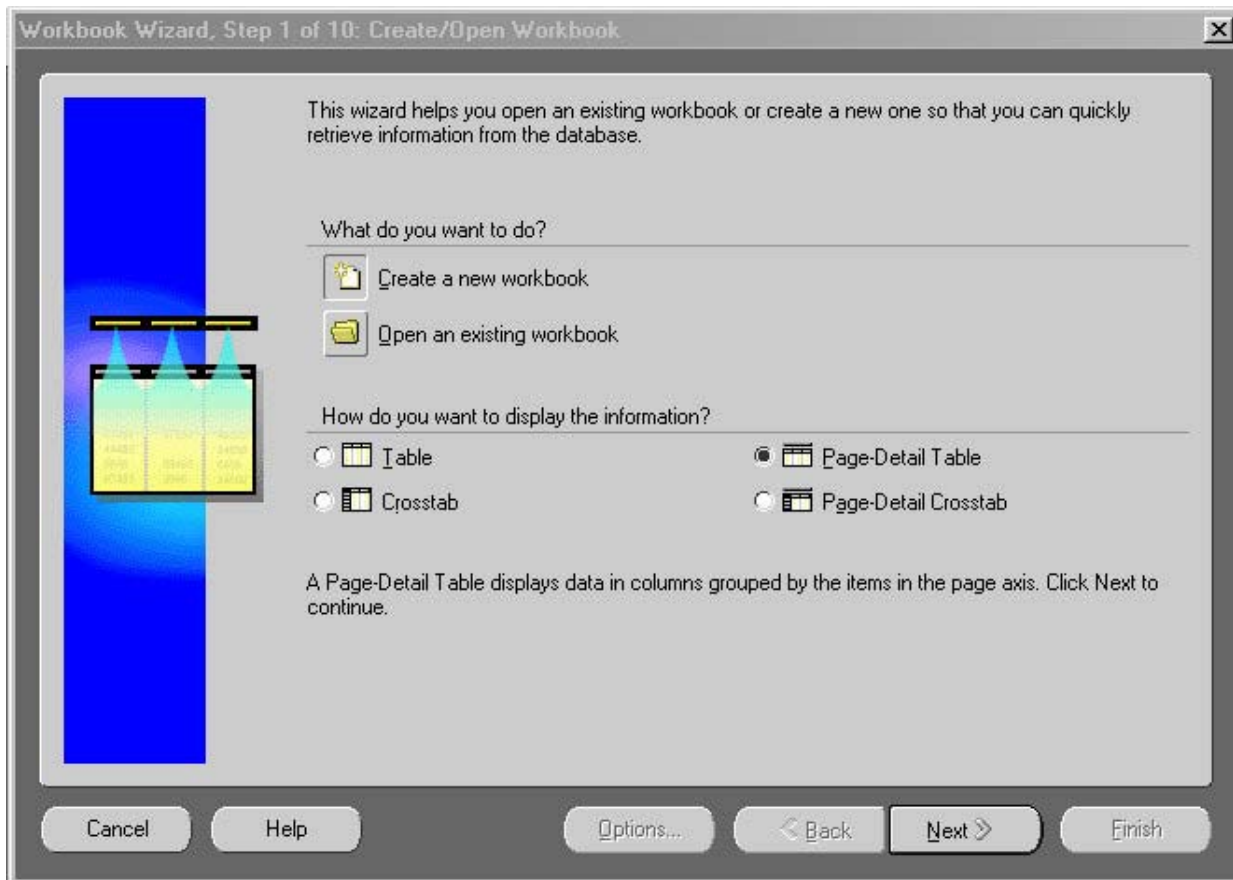
4.   Select the Create a New Workbook Icon.

5.   Select the Page-Detail Table Layout design and select (B) Next.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Page Detail Report Using Functions
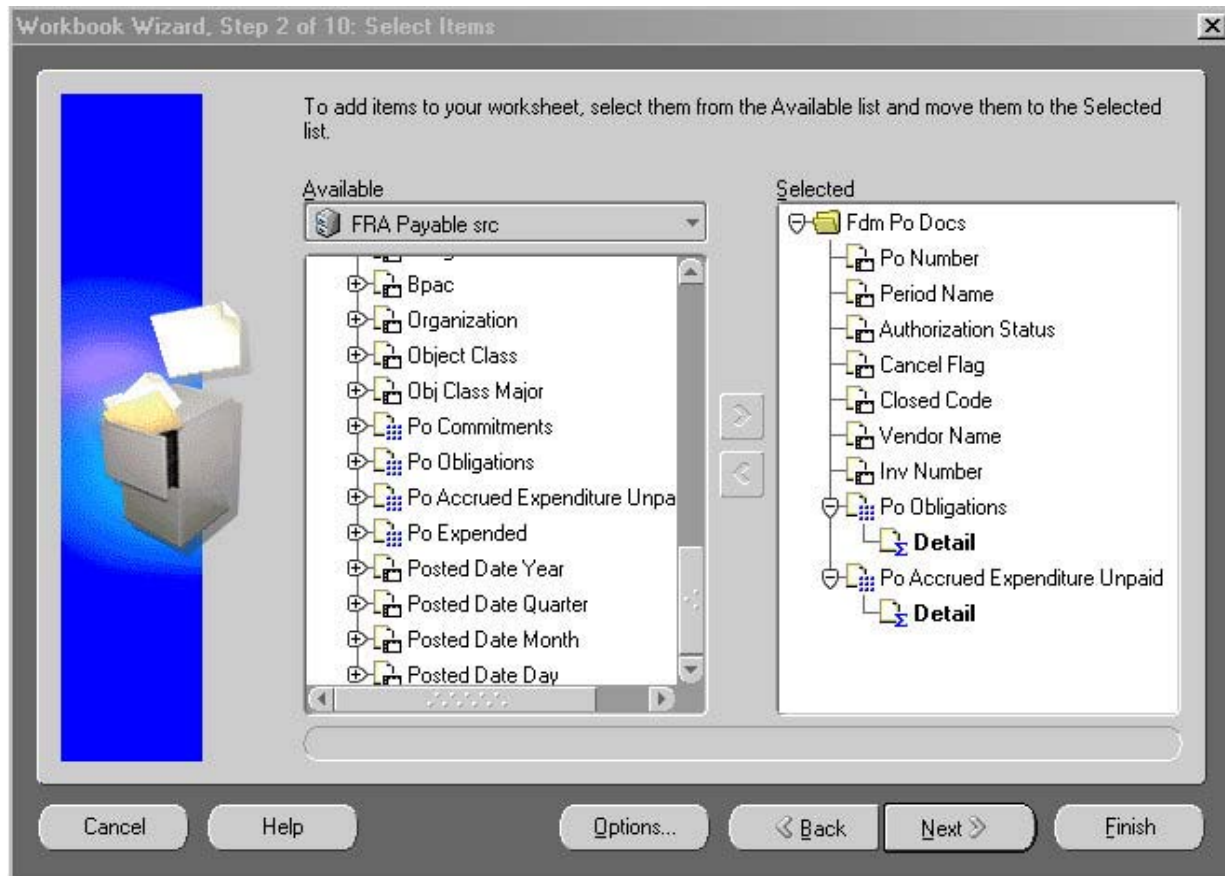
6.   Select on the dropdown arrow on the Available Box.

7.   Select Fdm Po Docs, Po Number, Period Name, Authorization Status, Cancel Flag, Closed Code, Vendor Name, Invoice Number, Po Obligation Detail, Po Accrued Expenditure Unpaid Detail from the Business Area. Select (B) Next.

Hint: Select on the item and use the > top arrow key to move it from the left side to the right side.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Page Detail Report Using Functions
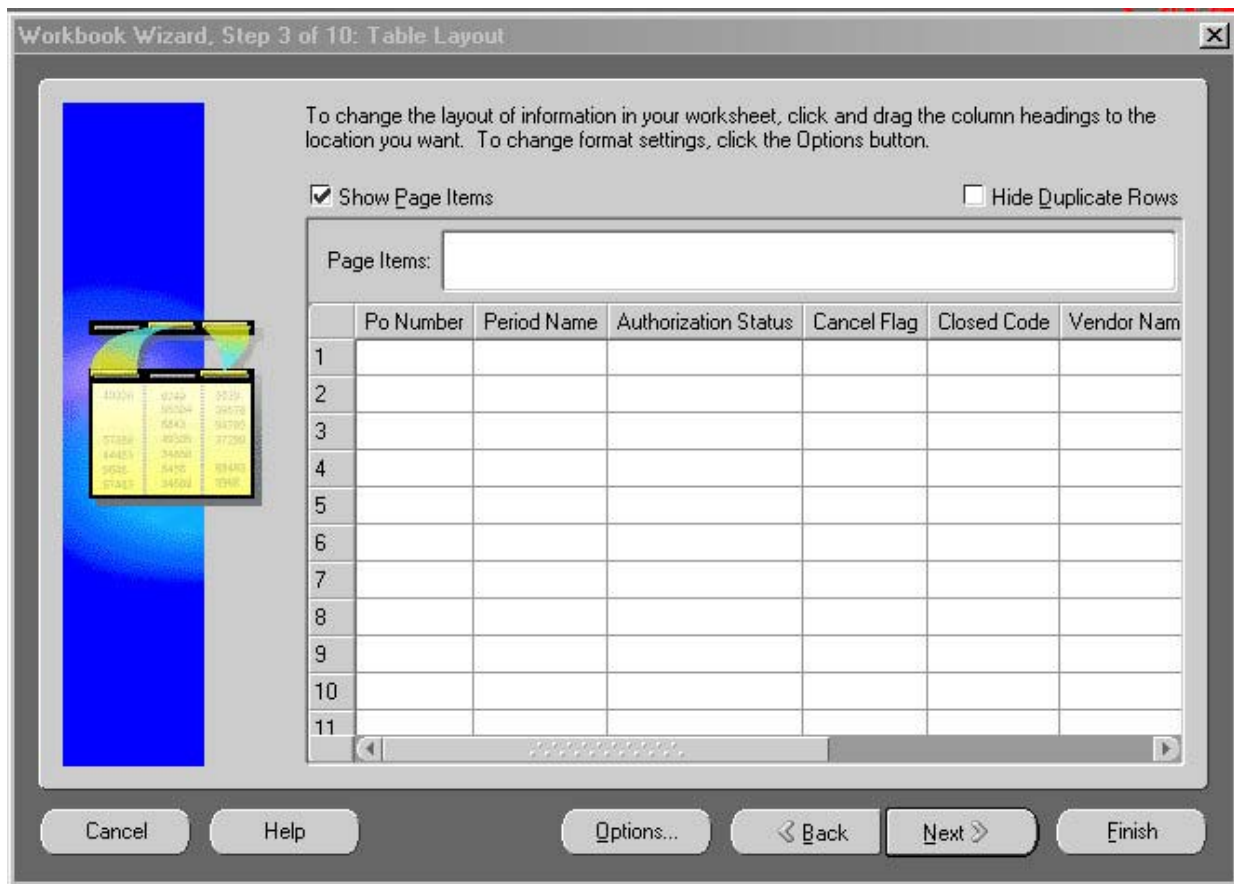
8.   You want Po Number to be in Column 1. Select on Po Number and drag to Column 1.

9.   Select (B) Options on the Table Layout screen.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Page Detail Report Using Functions
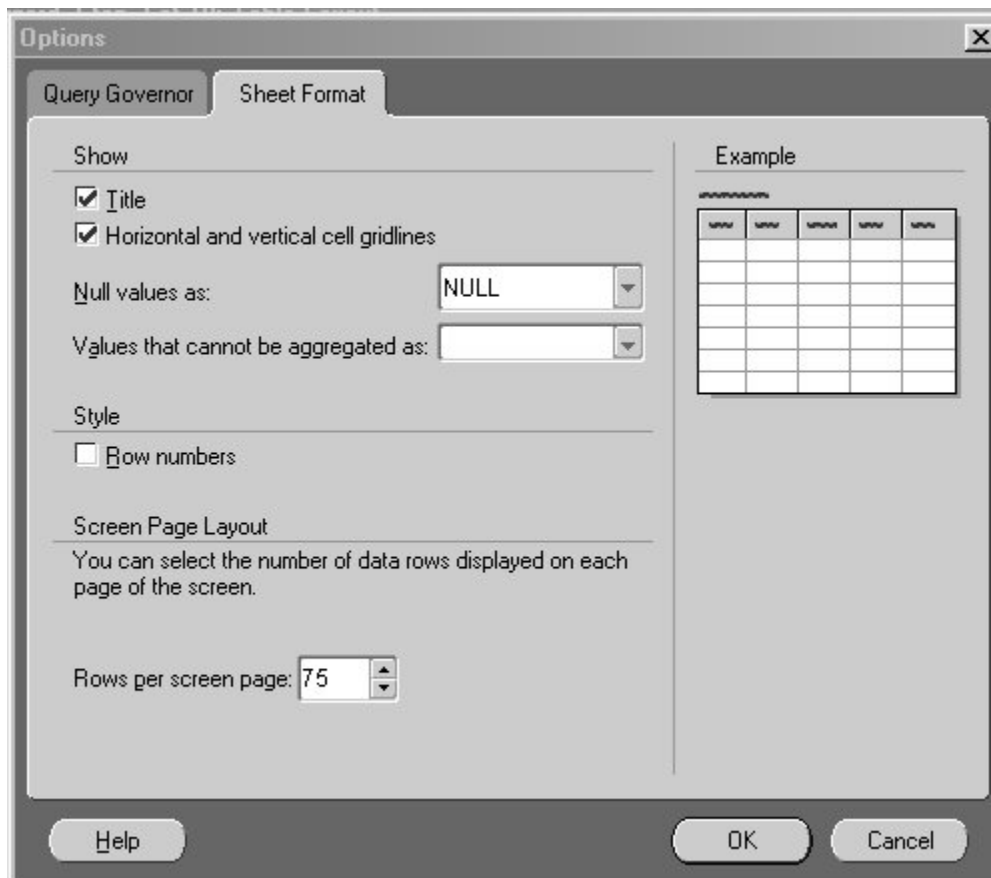
10. Select the Horizontal and vertical cell gridlines checkbox. Select (B) OK.

11. Select (B) Next. Select (B) Next again. You should be in the Conditions window. Select (B) New.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Page Detail Report Using Functions

12. Uncheck the Generate Name Automatically checkbox.

13. Name your condition "Approved Only".

14. Give the condition the description of "Limiting Purchase Orders by the Approved Only".

15. Select the "Authorization Status" from the dropdown list under Item.

16. Select "=" from the dropdown under Conditions.

17. Type in the word 'APPROVED' in the Value column. Hint: Be sure to use the single '
     mark at the beginning and at the end and not the " mark.

18. Select (B) OK.

Lab 1 Solutions: Creating a Page Detail Report Using Functions
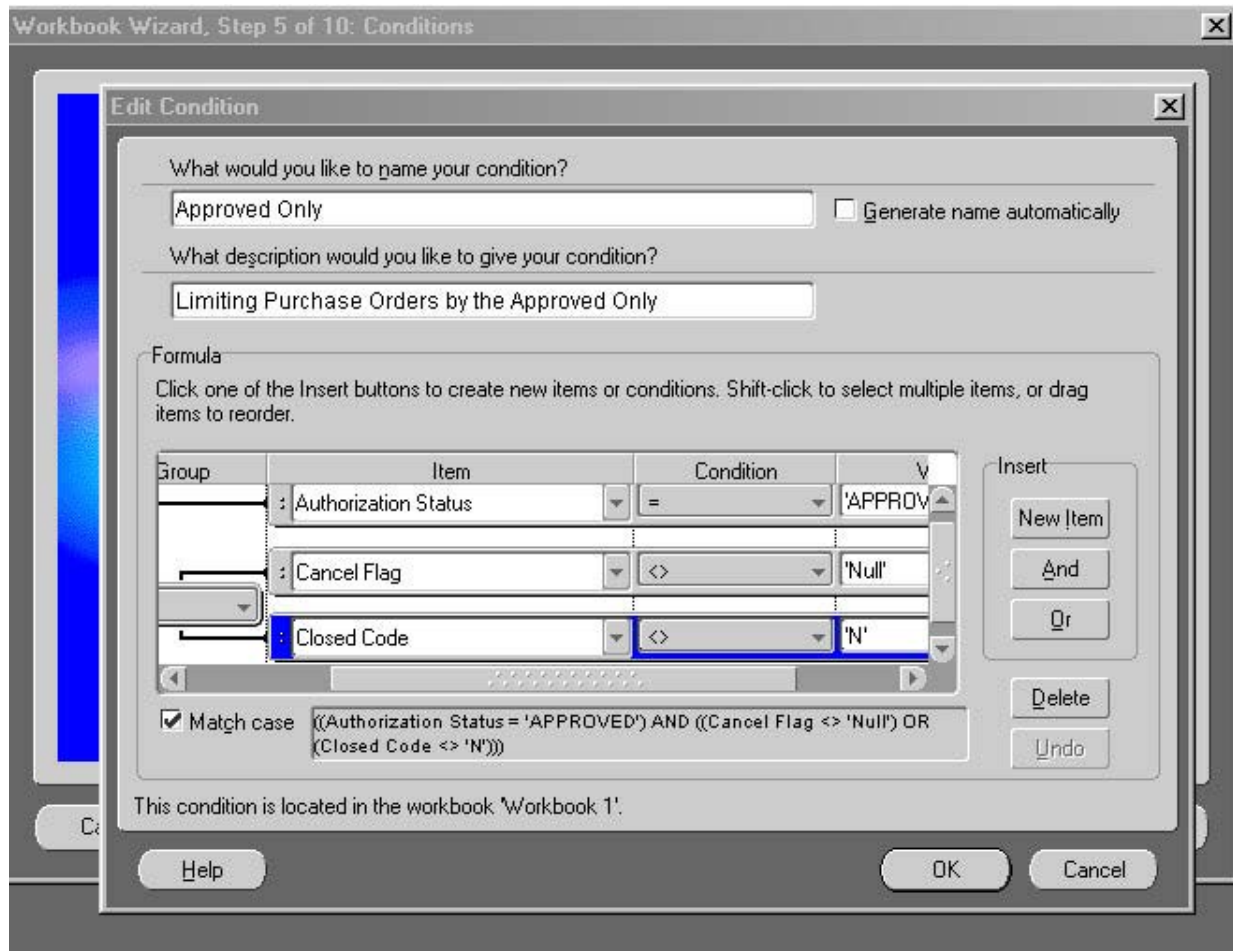
19. You want to create an Advanced Condition. Select the (B) Edit.

20. Select (B) Advanced.

21. You want to add an additional condition to exclude canceled Purchase Orders. Select (B) And.

22. Select the Cancel Flag from the Item list of values.

23. Select <> from the Conditions list of values. Type "Null' under Values column. With cursor still in the Values column select (B) Or.

24. Select Closed Code from the Items list of values.

25. Select <> from the Conditions list of values. Type 'N' under the Values column.

26. Select (B) OK.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Page Detail Report Using Functions

27. Select (B) Next. You should be in the Sort window.
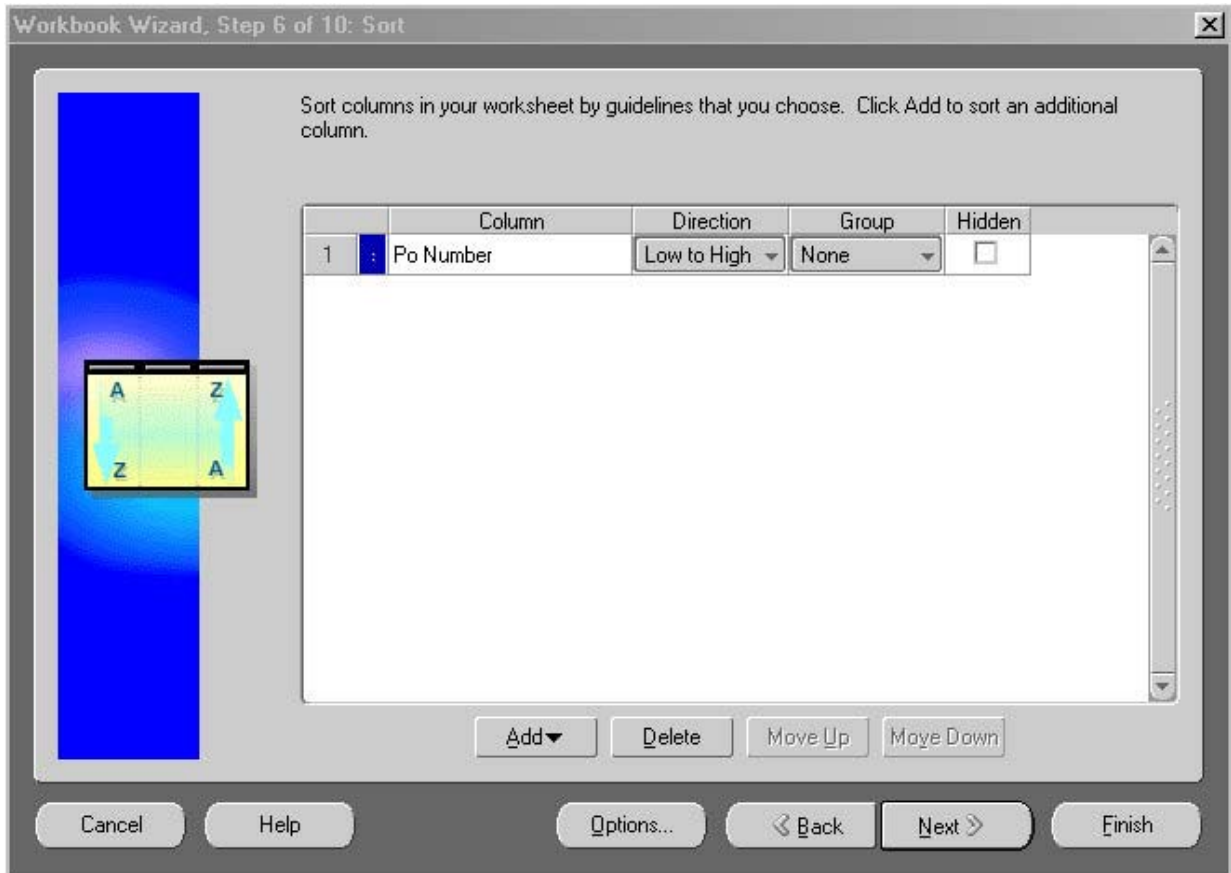
28. Select (B) Add and select PO Number.

29. Select Low to High in the Direction column and None in the Group column.

30. Select (B) Next. You should be in the Calculations window.   Select (B) New.

Lab 1 Solutions: Creating a Page Detail Report Using Functions
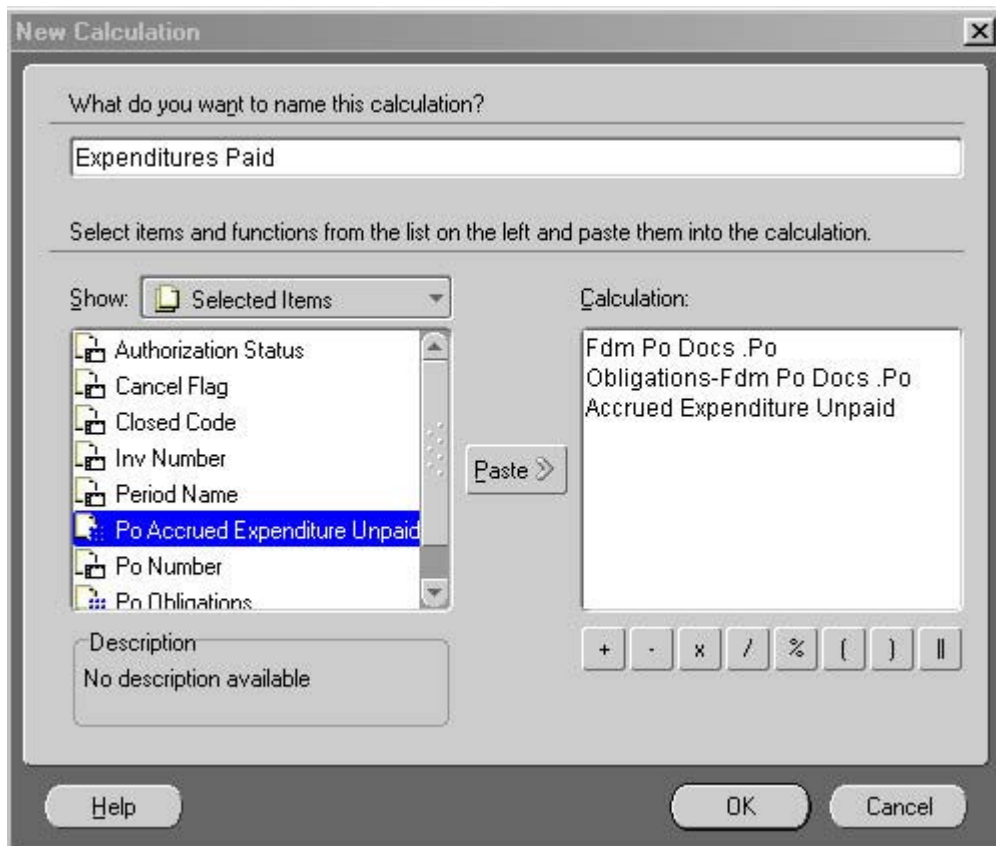
31. Name the calculation Expenditures Paid.

32. Select Po Obligations from the folders on the left and paste to the right.

33. Select - from the calculations operators on the right.

34. Select Po Accrued Expenditures Unpaid from the folders on the left and paste to the right.

35. Select (B) OK.

36. Select (B) Next. Select (B) Next again. You should be in the Totals window.

37. Select (B) New.

Lab 1 Solutions: Creating a Page Detail Report Using Functions

38. Create a Total on the Po Obligation Data Point.

39. Create a Sum Total.

40. Make it a Grand Total.

41. Show Label as Count.

42. Select (B) OK.

43. Select (B) Next.

44. Select (B) New. You should be in the Parameters window.

Using Discoverer 4i Web

Lab 1 Solutions: Creating a Page Detail Report Using Functions

45. Name the Parameter "Limiting Period Name".

46. Base your Parameter on Period Name.

47. Prompt users with "Please enter Period Name".

48. User Operator: f(X) LIKE.

49. Select (B) OK.

50. Select (B) Finish.

Lab 1 Solutions: Creating a Page Detail Report Using Functions
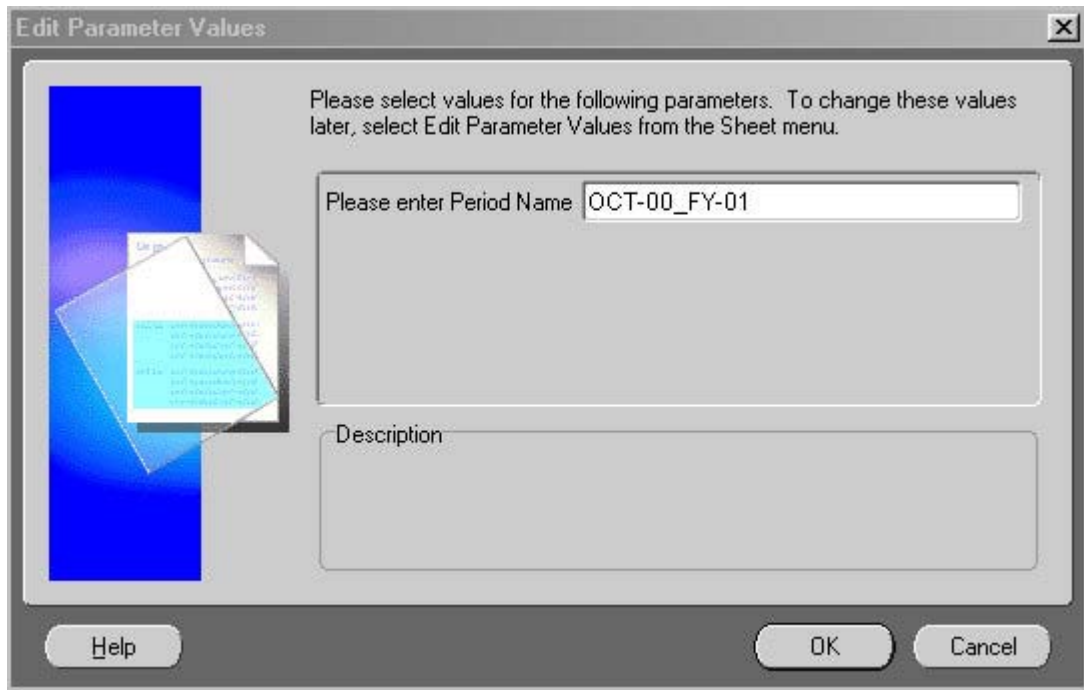
51. When prompted by the Parameter box, enter OCT-00_FY-01.

52. Select (B) OK.

Lab 2: Saving a Workbook to the Database

Instructions

You have completed your workbook and now need to save it to the database for retrieval later.

Save your workbook as XX PageDetailLAB3. XX will be your monitor number that will be assigned by your instructor.

Lab 2 Solutions: Saving a Workbook to the Database
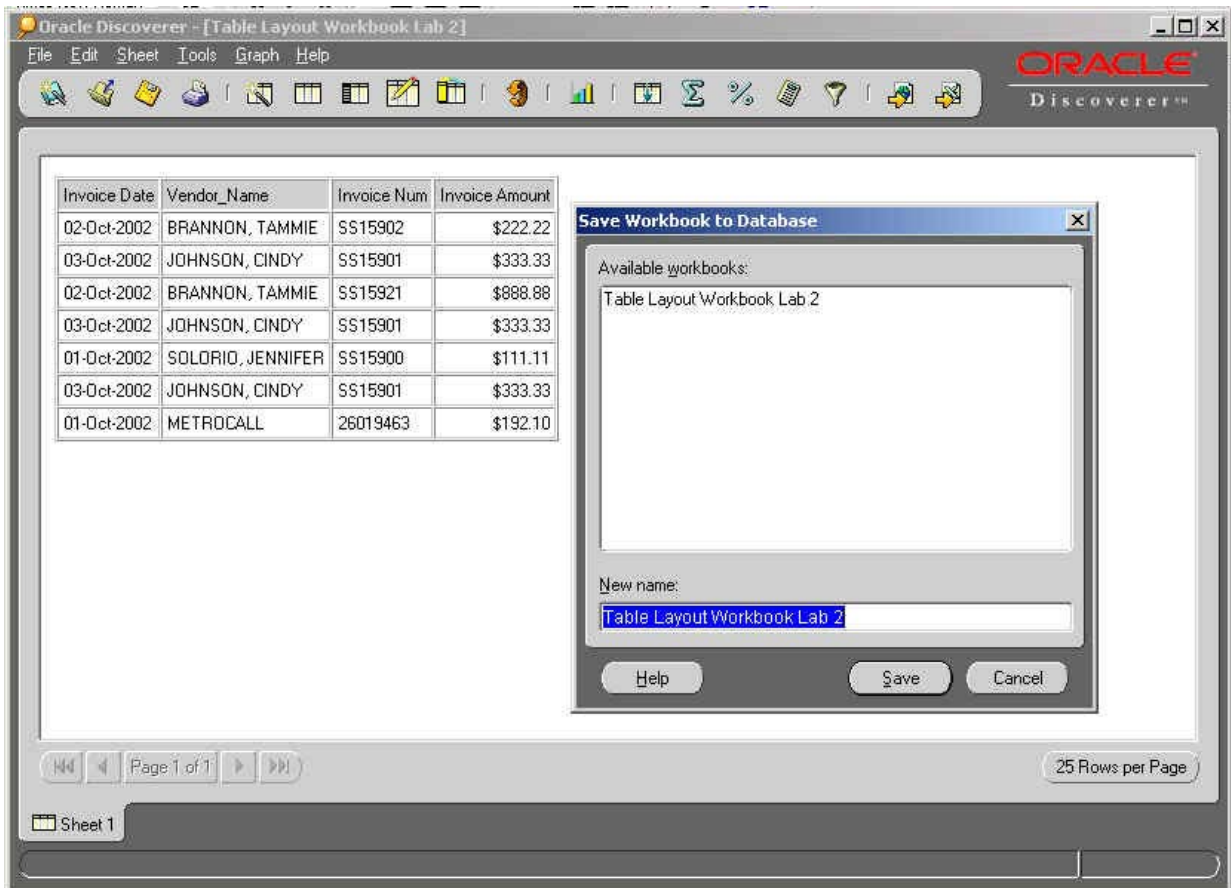
1. Select (M) File: Save As. Name the report XX PageDetail LAB3. The XX will refer to your monitor number assigned to you by your instructor. Select (B) Save.
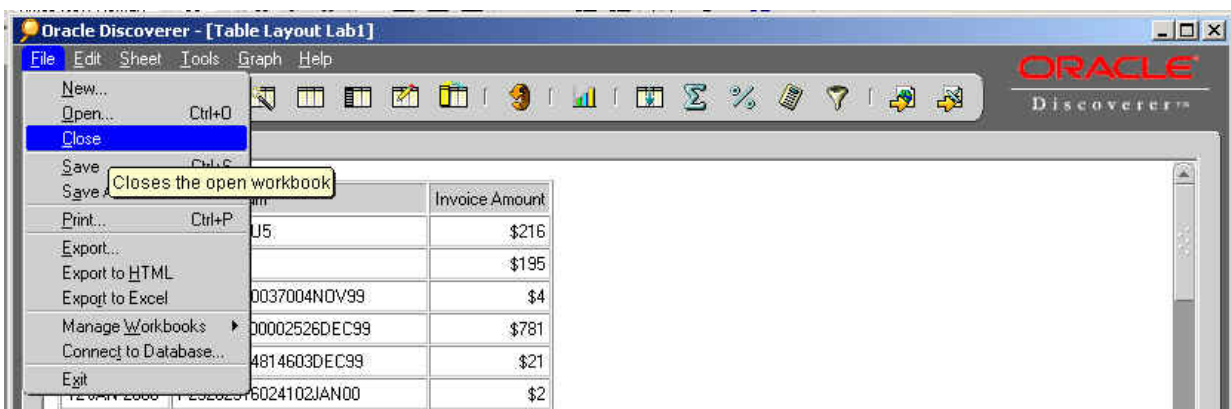
2. Close Discoverer. Select (M) File: Close.

Graphs

Discoverer 4i Web provides the Graph Wizard to create a graph from your worksheet data.

Creating a Graph

Oracle Discoverer
N → Create/Open Workbook
Connect to Oracle Discoverer

1. In the Connect to Oracle Discoverer window, enter the requested information.

Using Discoverer 4i Web
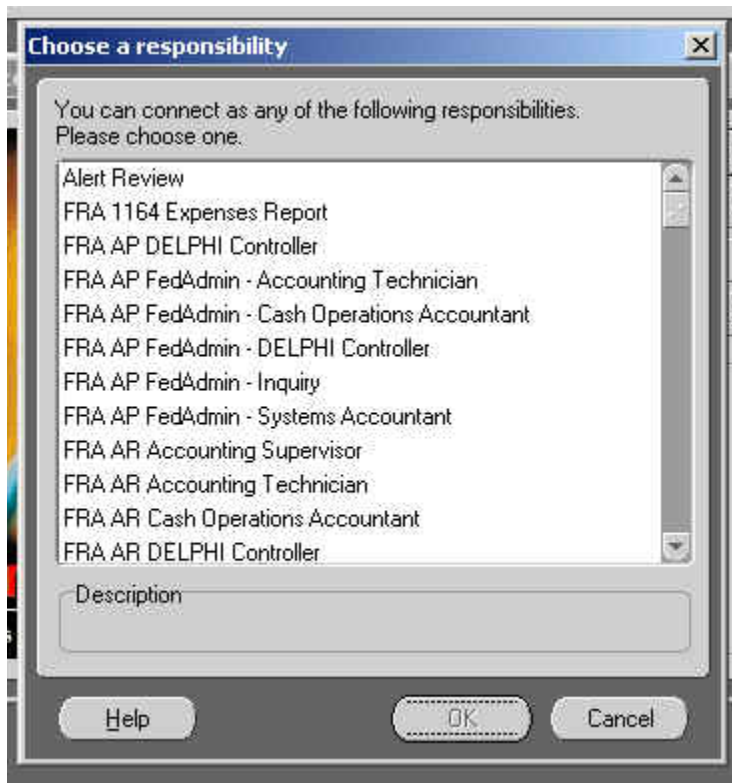
2. Select a responsibility.

Creating a Graph with a New Workbook

Workbook Wizard, Step 1 of 10: Create/Open Workbook

This wizard helps you open an existing workbook or create a new one so that you can quickly retrieve information from the database.

What do you want to do?

☐ Create a new workbook

☐ Open an existing workbook

Cancel   Help   Options...   ◁ Back   Next ▷   Finish
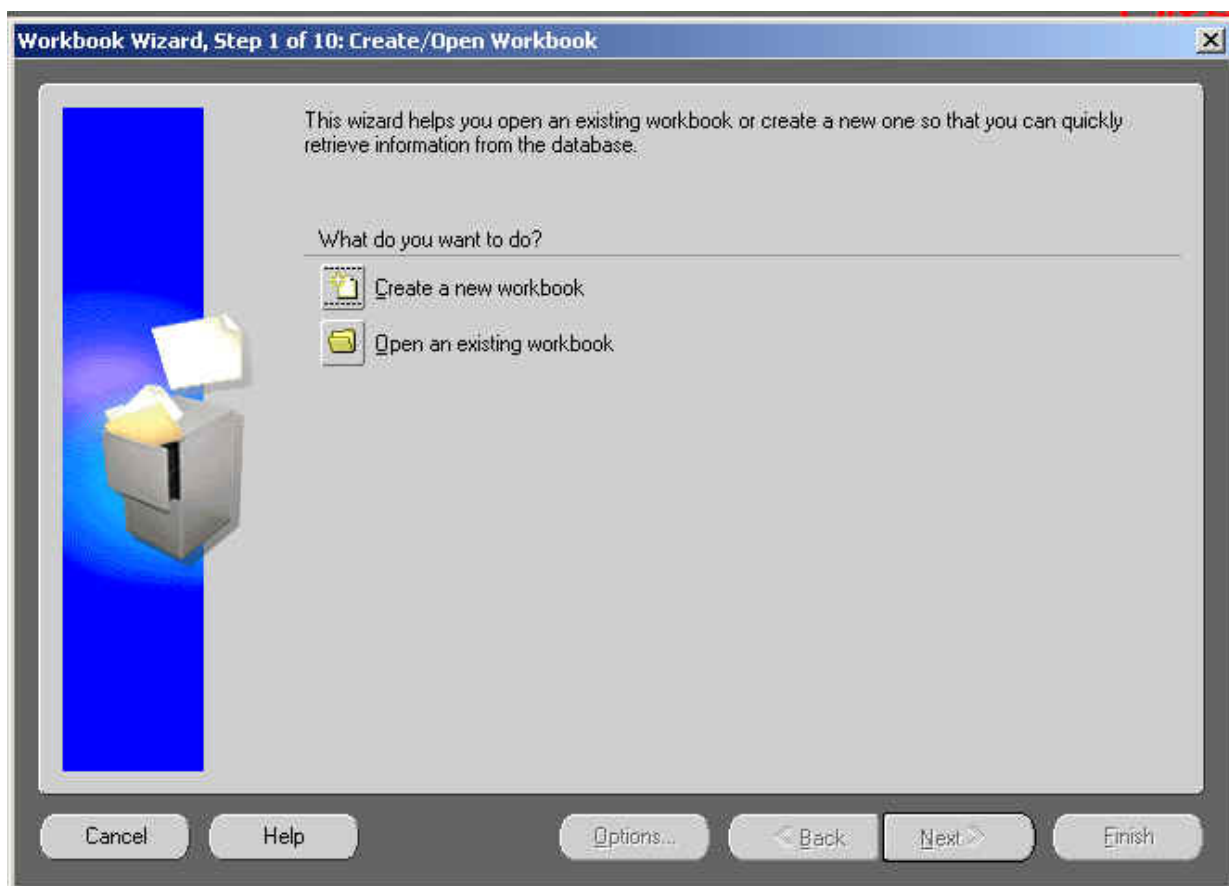
3.   Select the Create a new workbook icon.
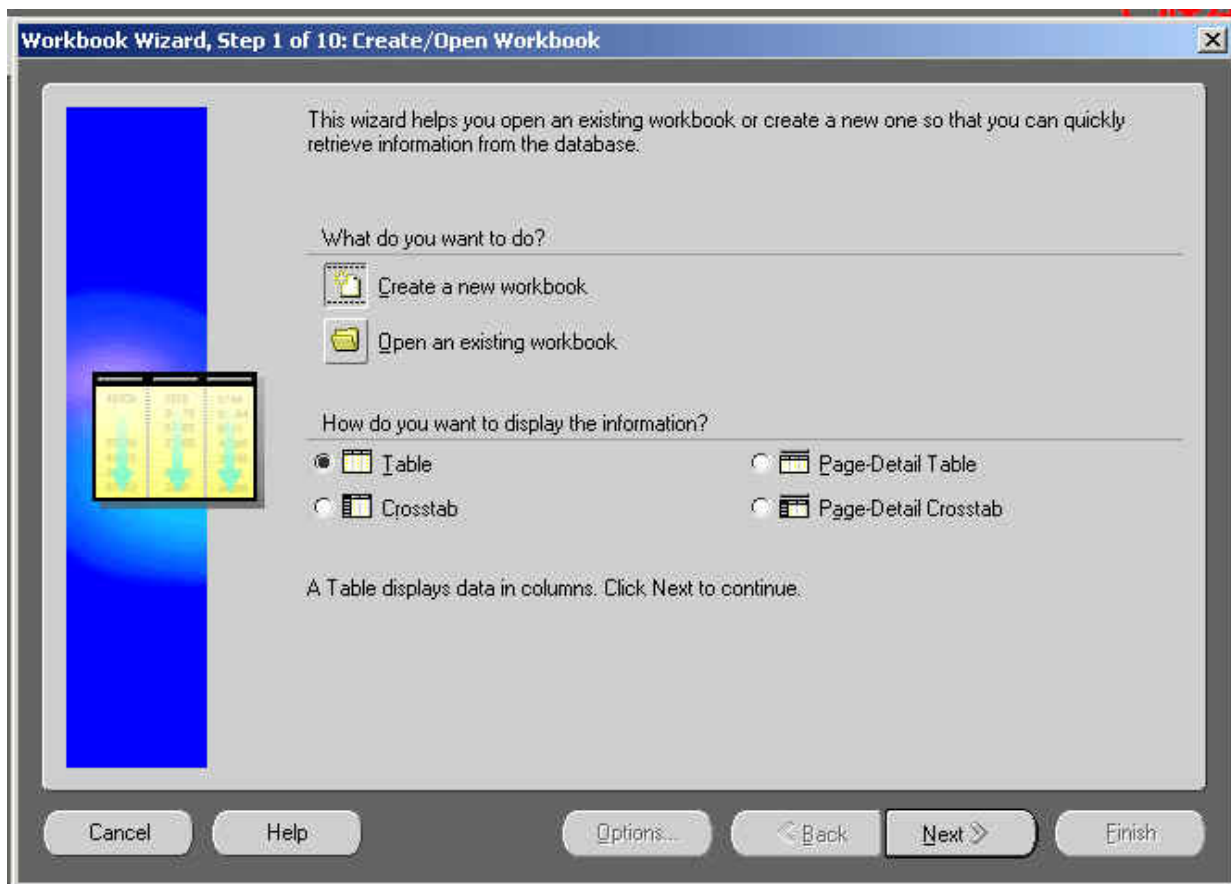
4. Select the method in which to display the information.
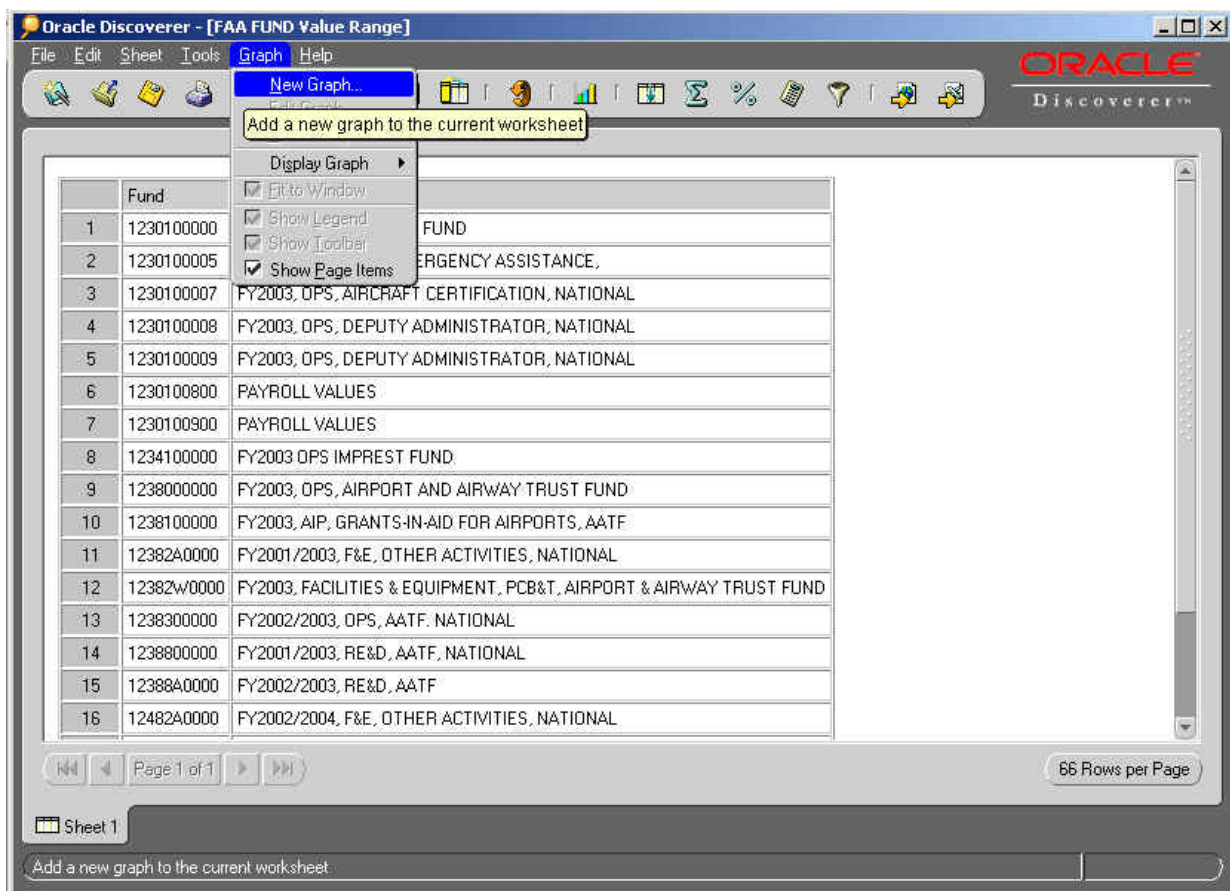
5. Select (M) Graph: New Graph or select the Graph Icon from the toolbar. The Graph Type dialog box will appear.
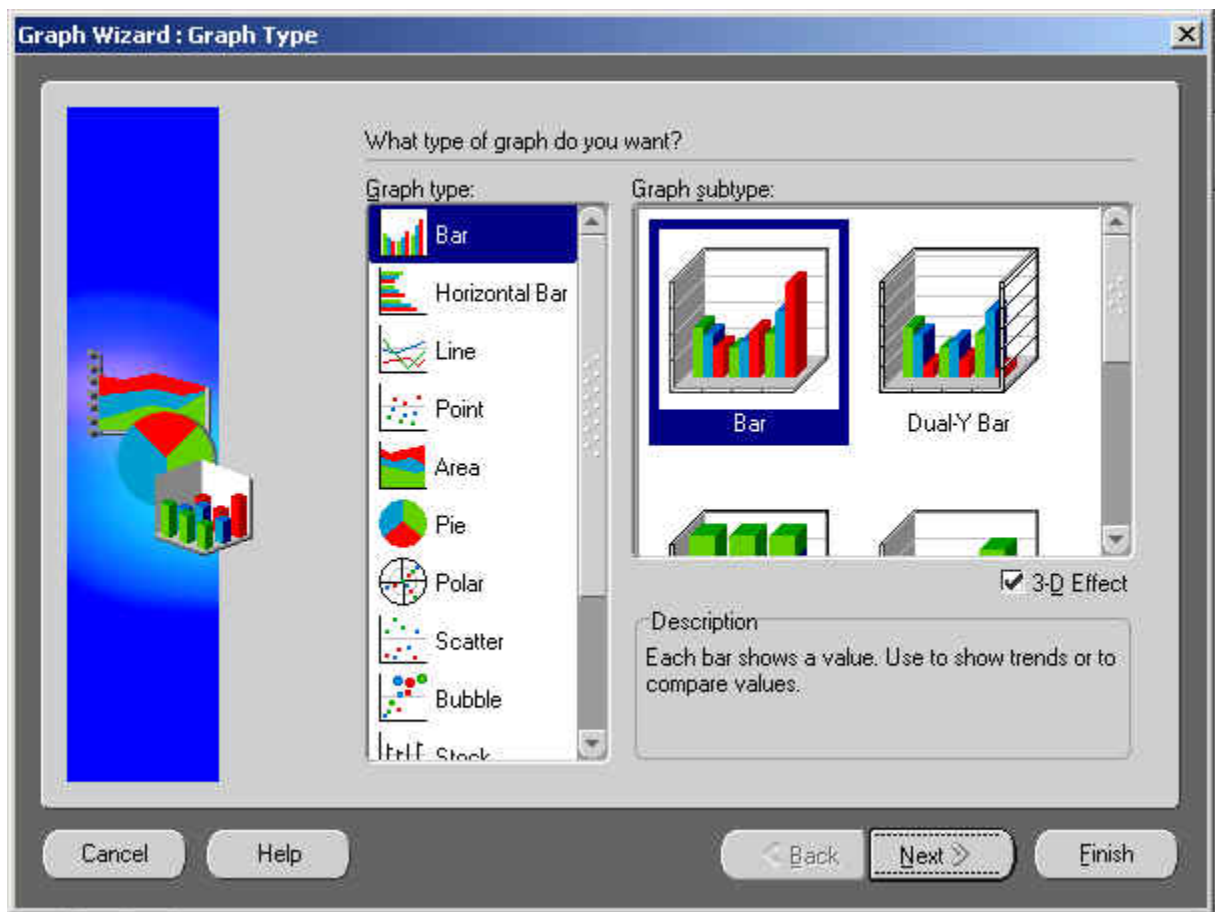
Note: It is important to understand that the options in the Graph Type dialog box will differ depending on what Graph Type you select. For example, if you select a Bar Chart, you will have the option to select a Y-Axis and line definition whereas a Pie Chart will not have a Y-Axis but will have additional plotting areas. For this navigational document the demonstrated screenshots will be a Pie Chart selection.
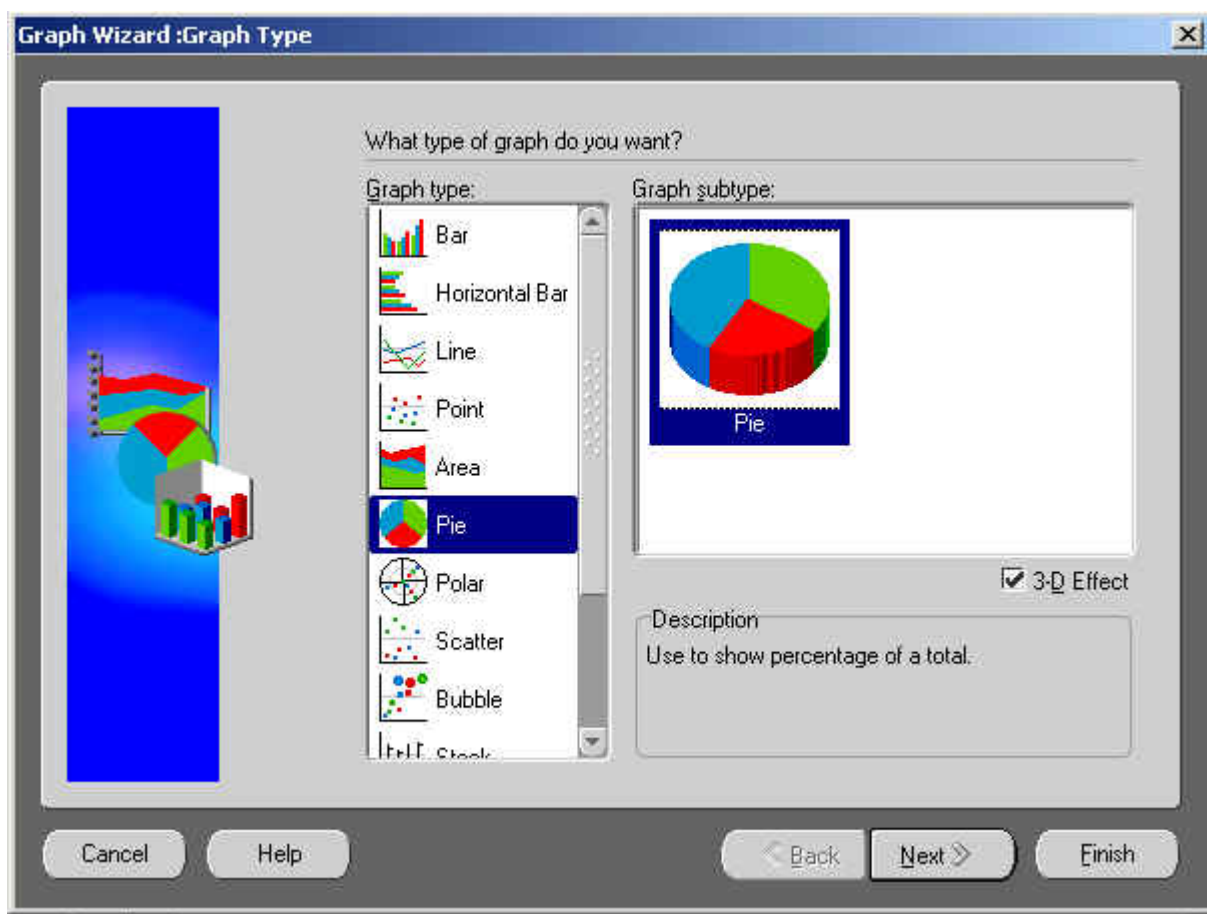
6. Select Pie Chart from the Graph Types on the left.

7. Select the 3D Effect checkbox and select (B) Next to go to the Titles, Totals and Series sheet of the Graph Wizard.
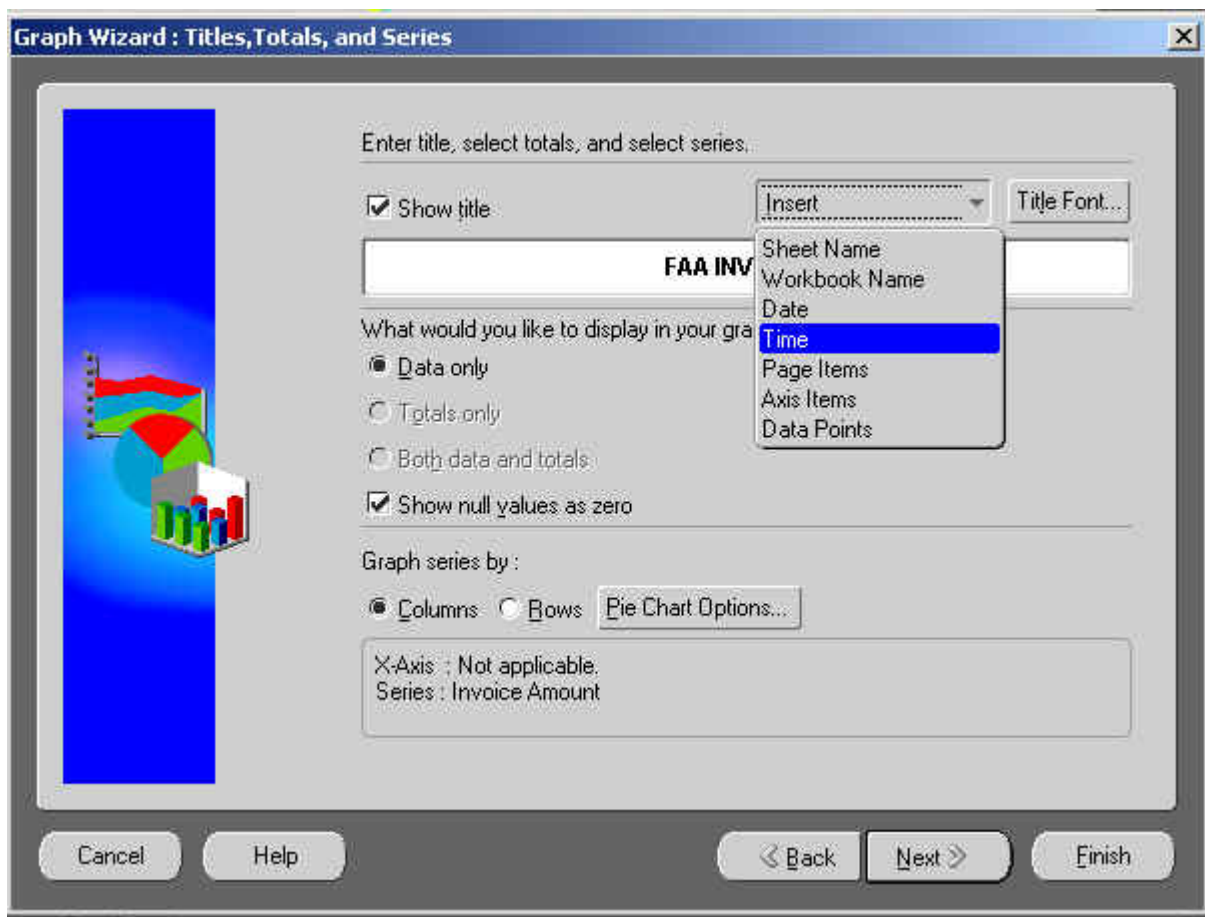
8. Select the Show title checkbox to display your Workbook title.

9. Select from the Insert dropdown list to select other items to include in the title such as Date, Time, or the Worksheet Name.

10. Select the radio button that corresponds to the information you want to display in your graph. Select from data, totals, or data and totals.
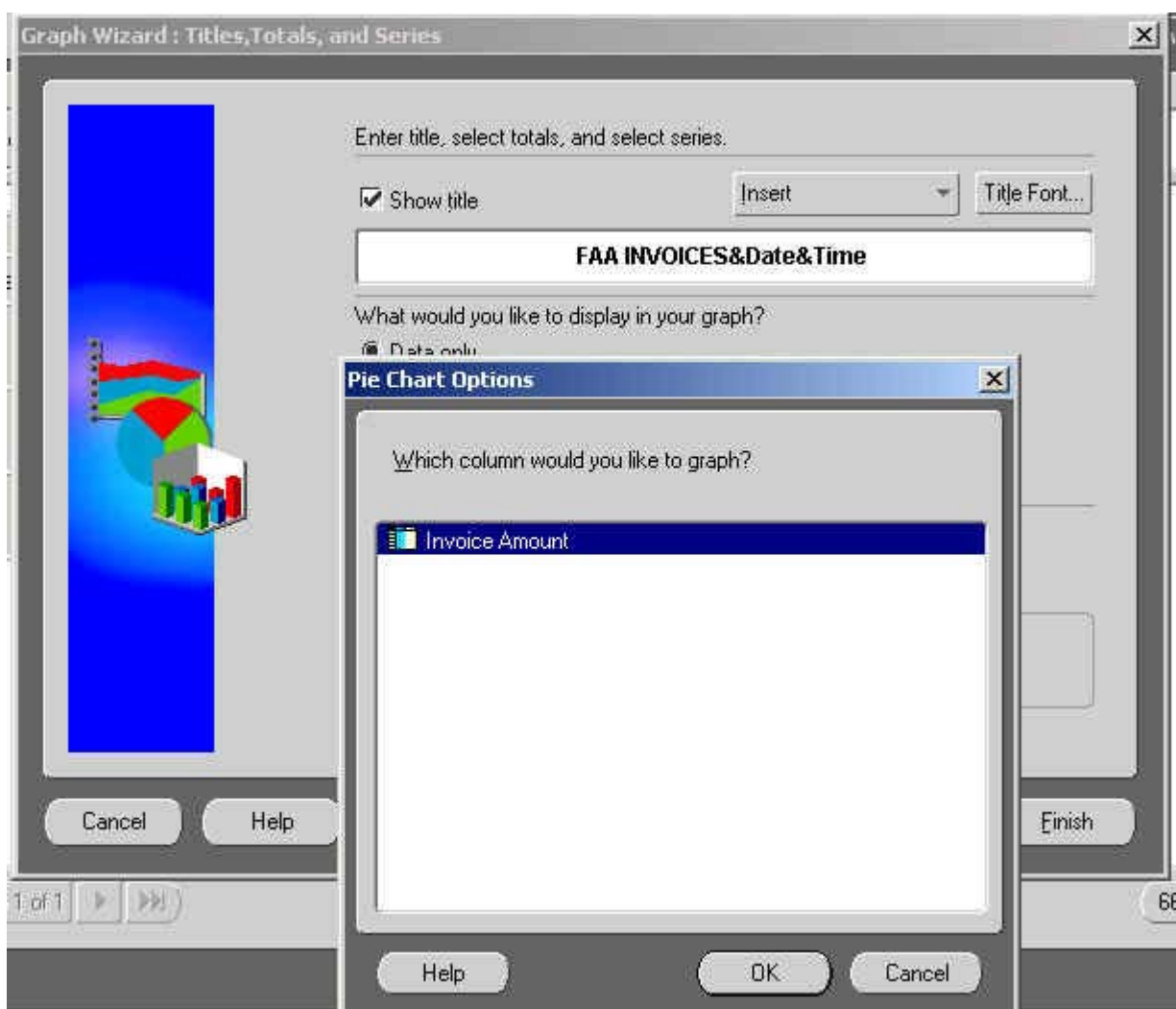
11. In the Graph Series by area, select Columns, Rows or Pie Chart Options. A dialog box will appear requesting what columns or rows to include in the graph.

Graph Wizard : Plot Area

Select options for the plot area of your graph.

Background color:

☐ Show horizontal grid lines: Color

☑ Show vertical grid lines: Color

☑ Show data labels on pie slices.   Options...

☑ Show data tips when mouse is over pie slices.   Options...

Select options for the series displayed in your graph.

Series	Color
01-OCT-2002, FA-DTFASW02L199-1	(blue)
01-OCT-2002, FA-DTFASW03L00003-1	(green)
01-NOV-2002, FA-DTFASW03L00003-2	(magenta)

Cancel   Help   ≪ Back   Next ≫   Finish

12. Select Next to proceed to the Plot Area of the Graph Wizard.

13. Select a background color by selecting the down arrow on the Background Colors icon.

14. Select on (B) Options for Show Data Labels on Pie Slices. A Data Label Options dialog box will appear.

Using Discoverer 4i Web
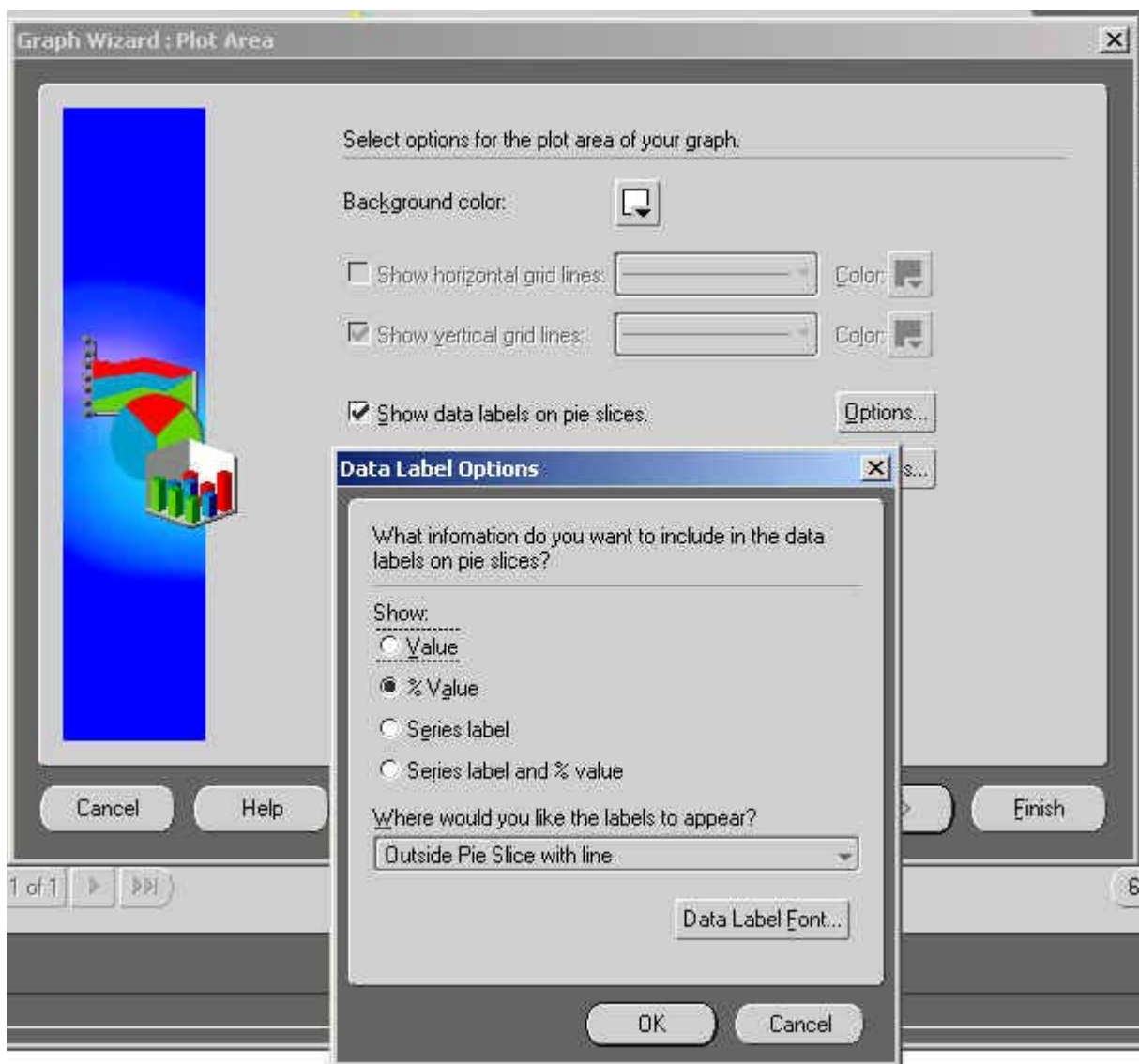
15. Select what data you want on the pie slices labels and where you want the data to be displayed, outside the pie slice or outside the line of the pie slice. Modify the font of this data by selecting (B) Data Label Font. Select (B) OK.

Using Discoverer 4i Web
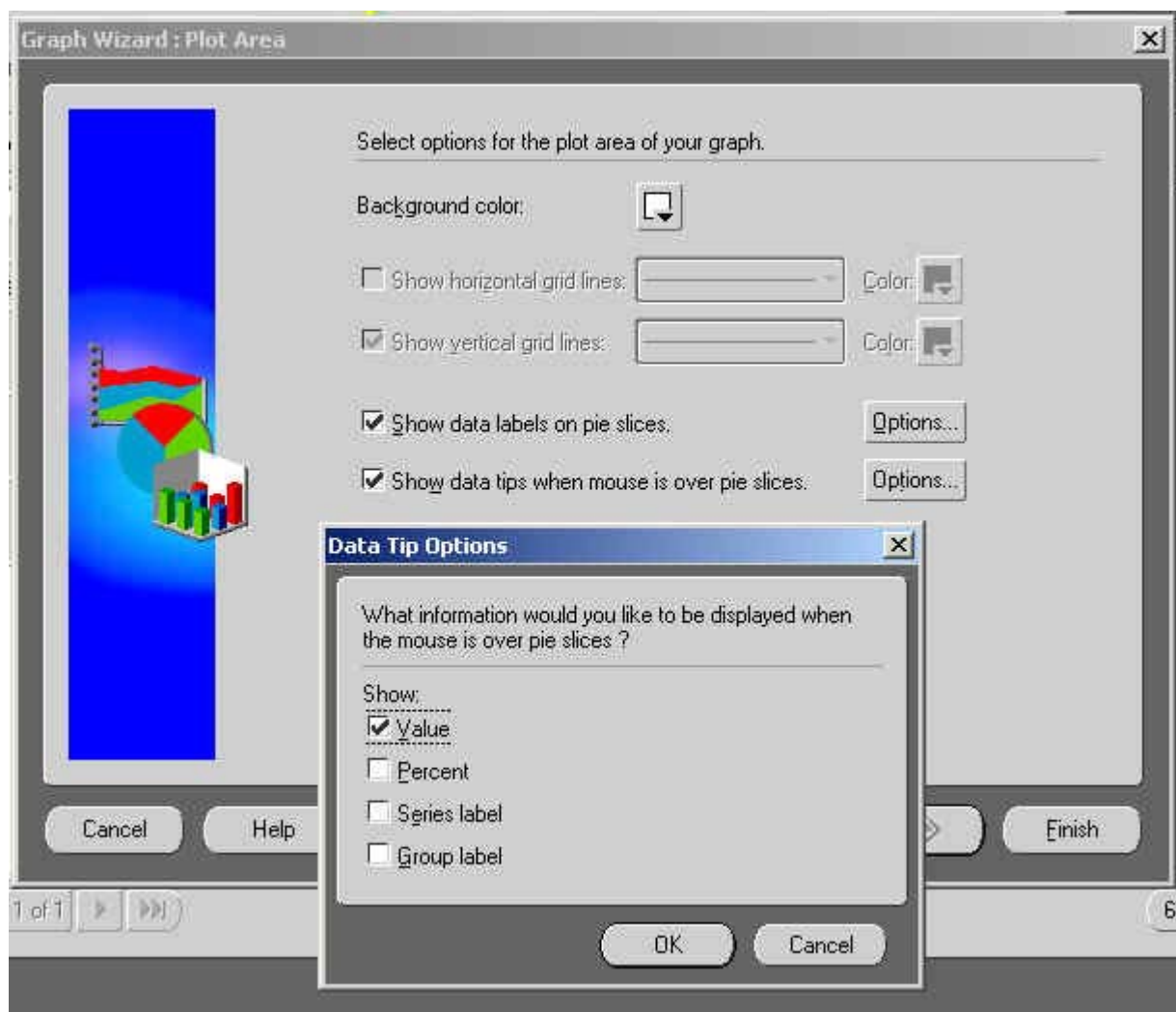
16. Select the (B) Options for Show Data Labels on Pie Slices. The Data Tip Options dialog box will appear. Select the radio buttons that corresponds to the information you want displayed on your graph. You may select more than one option.

Using Discoverer 4i Web

Graph Wizard : Plot Area

Select options for the plot area of your graph.

Ba...

Se...

01-OCT-2002, FA-DTFASW02L199-1

01-OCT-2002, FA-DTFASW03L00003-1

01-NOV-2002, FA-DTFASW03L00003-2

Cancel   Help   Back   Next   Finish
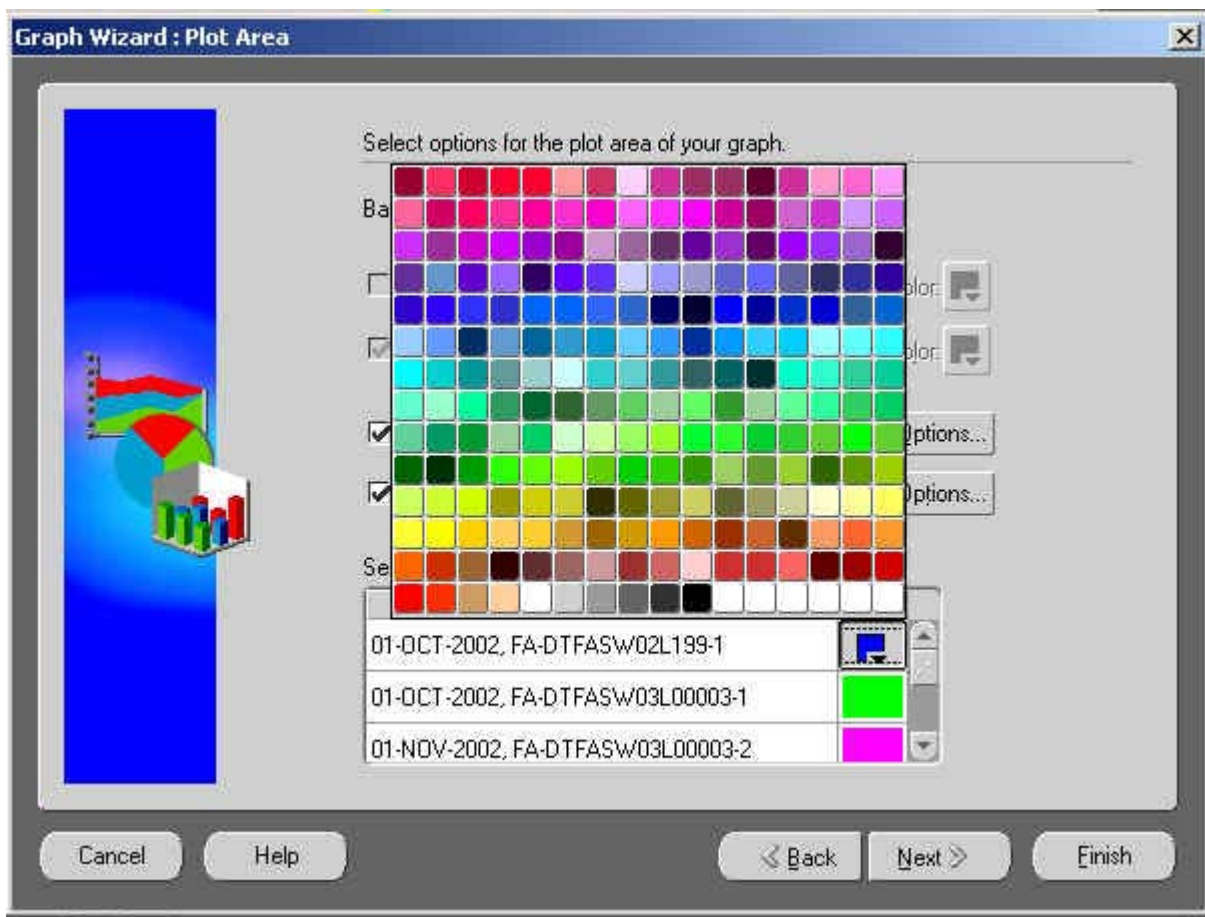
17. In the Select Options for the Series Displayed in Your Graph area, modify the color selections by selecting on the color at the right of the box. Make changes by selecting on a different color.

18. Select (B) Next to go to the Legend screen of the Graph Wizard.

Using Discoverer 4i Web
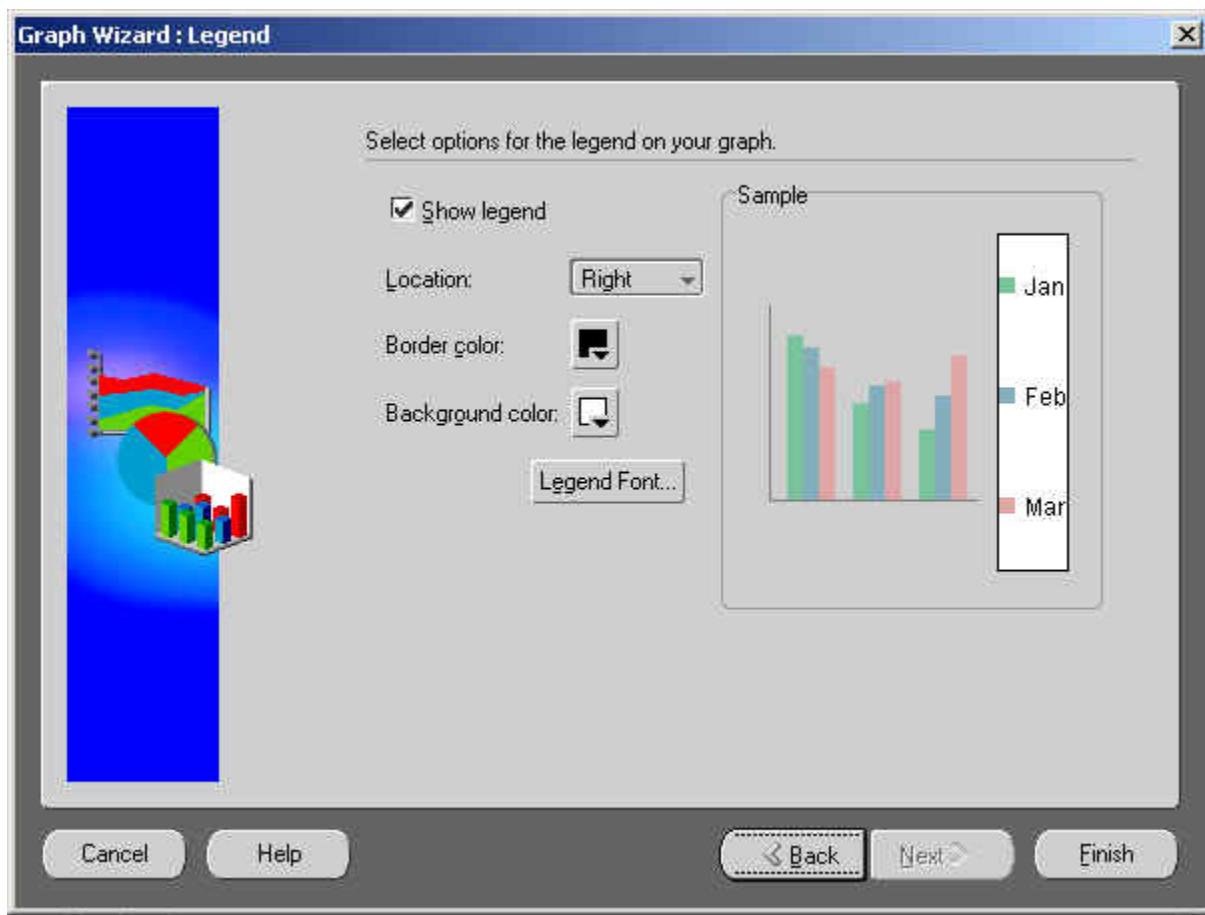
19. To display the legend of your graph select the Show Legend checkbox.
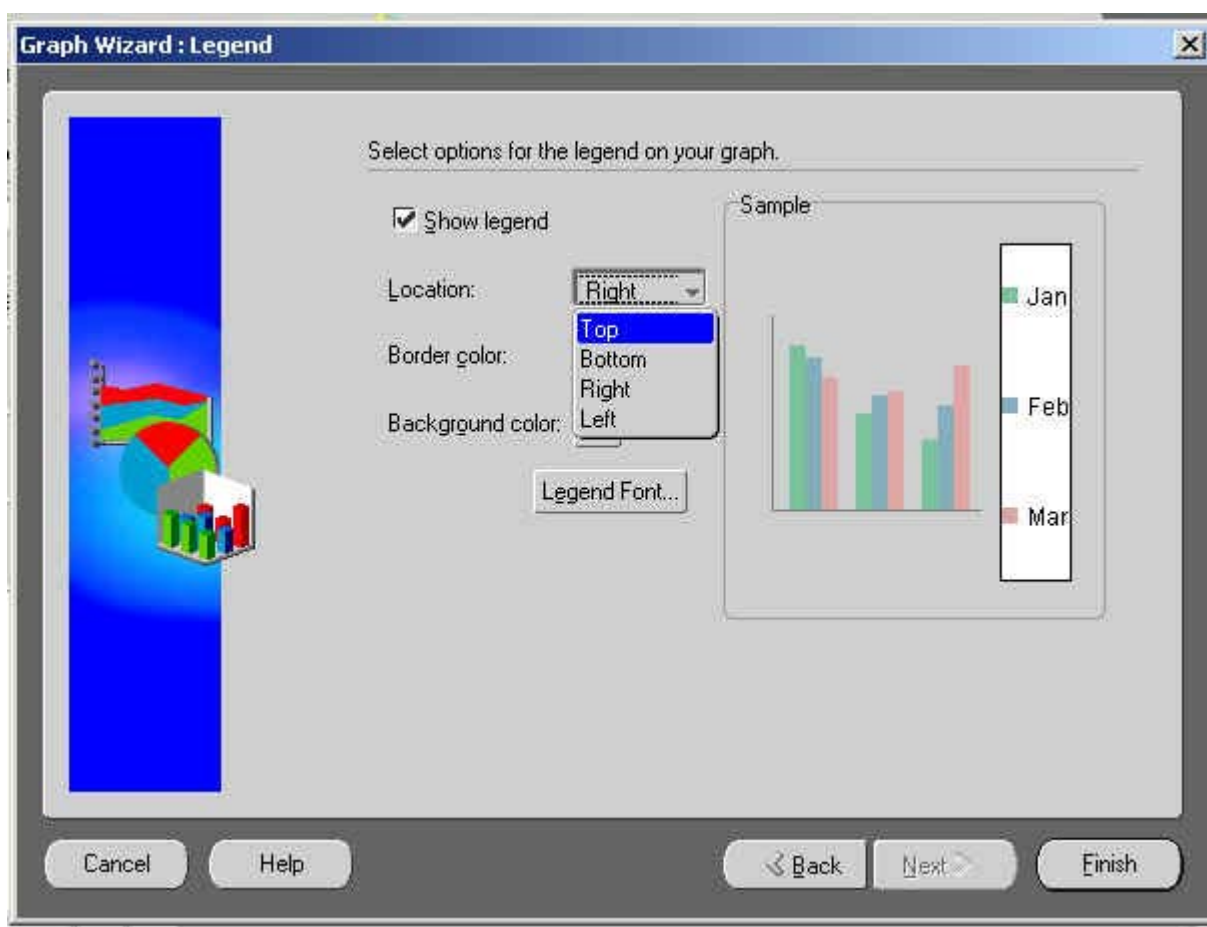
21. From the Location dropdown list, select where to place the legend. Choices will include top, bottom, left, and right.

22. Modify the Border color, Background color, Legend Font by selecting on the respective icons.

23. Select (B) Finish to display your graph within your workbook.

Using Discoverer 4i Web
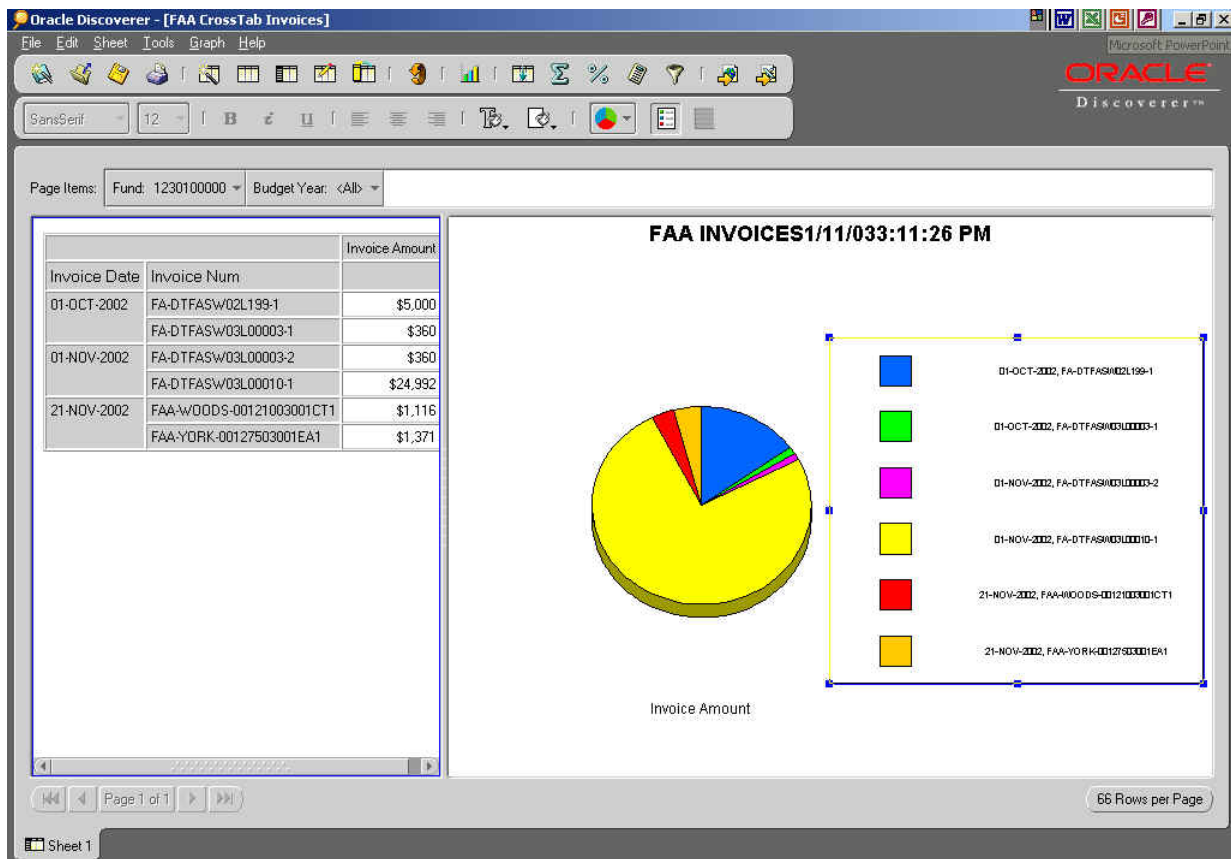
Note: A new toolbar allows you to modify or adjust your graph. This toolbar will remain active as long as your graph is selected.

24. Select (M) File: Save As to save your graph.

Creating a Graph with an Existing Workbook

Workbook Wizard, Step 1 of 10: Create/Open Workbook

This wizard helps you open an existing workbook or create a new one so that you can quickly retrieve information from the database.

What do you want to do?

Create a new workbook

Open an existing workbook

Where is the workbook you want to open?

Database...

Scheduled...

Cancel   Help   Options..   Back   Next   Finish
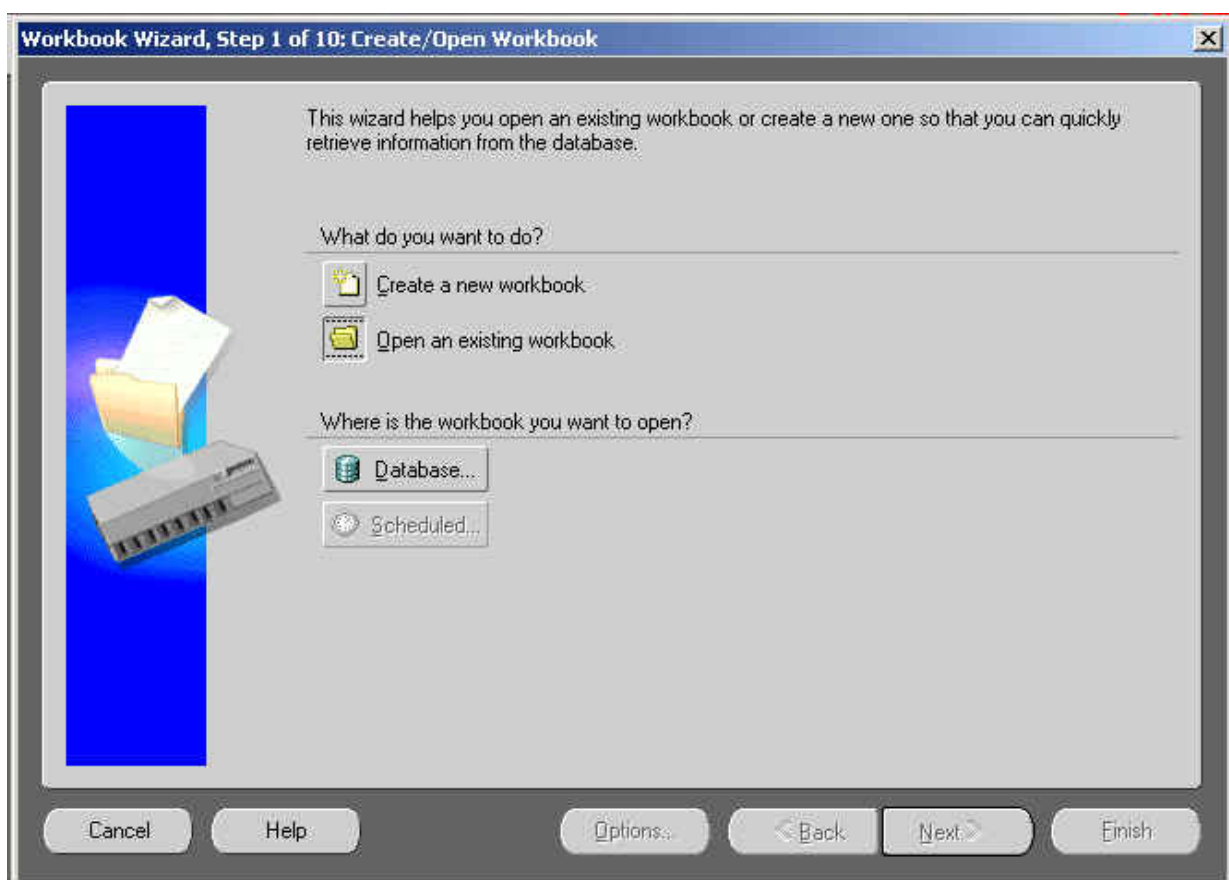
25. Select on the Open an existing workbook icon and select the Database icon. Select the needed database.

Using Discoverer 4i Web
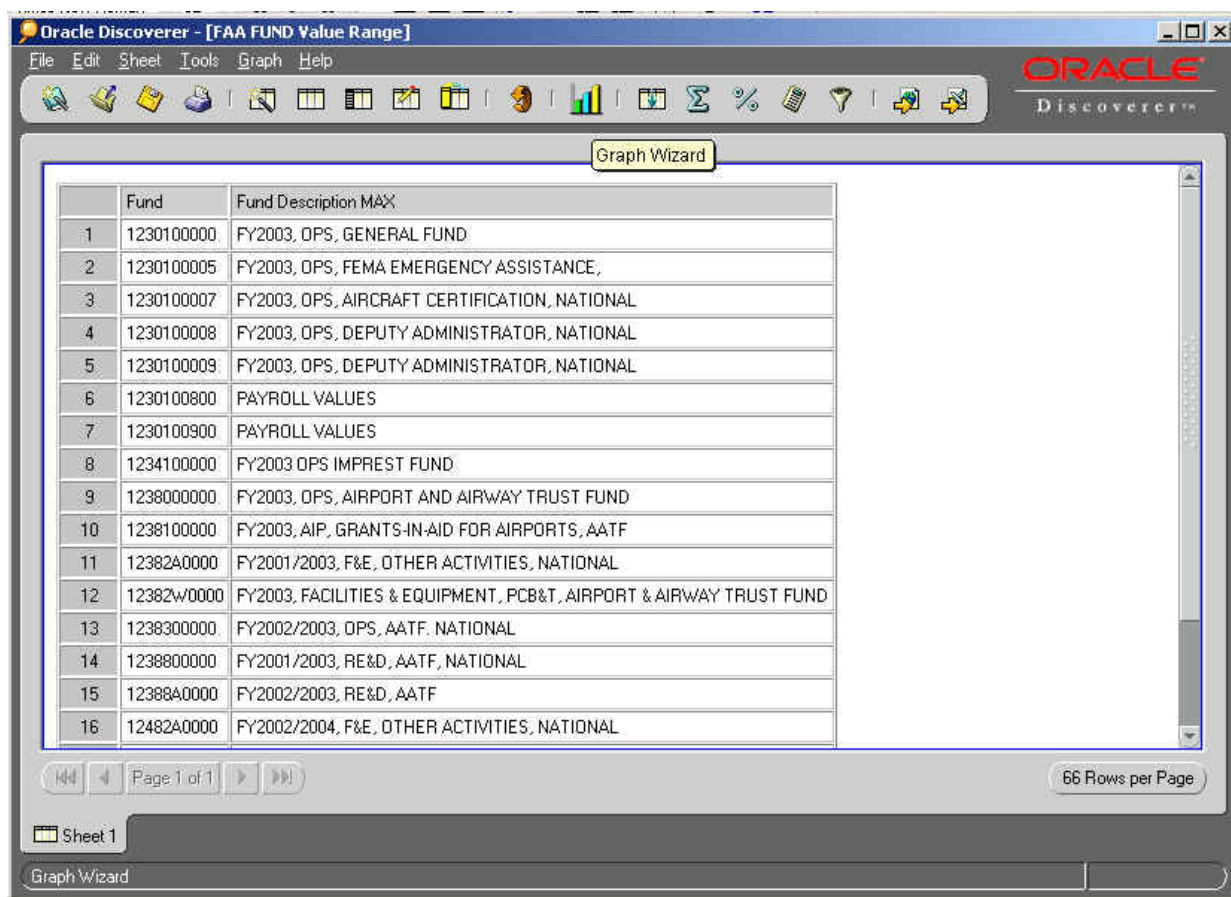
26. Select (M) Graph: New Graph or select the Graph Tool Icon from the Discoverer toolbar.

27. Repeat Tasks 6 through 24.

Using Discoverer 4i Web

Exporting

Discoverer 4i Web provides exporting ability of workbooks, worksheets and graphs. The export feature provides several formats available for differing applications such as, Internet Explorer, Microsoft Excel, Microsoft Word etc.

Exporting a Workbook

Oracle Discoverer
N → Create/Open Workbook
Connect to Oracle Discoverer

1. In the Connect to Oracle Discoverer window, enter the requested information.

Using Discoverer 4i Web

2. Select the responsibility.
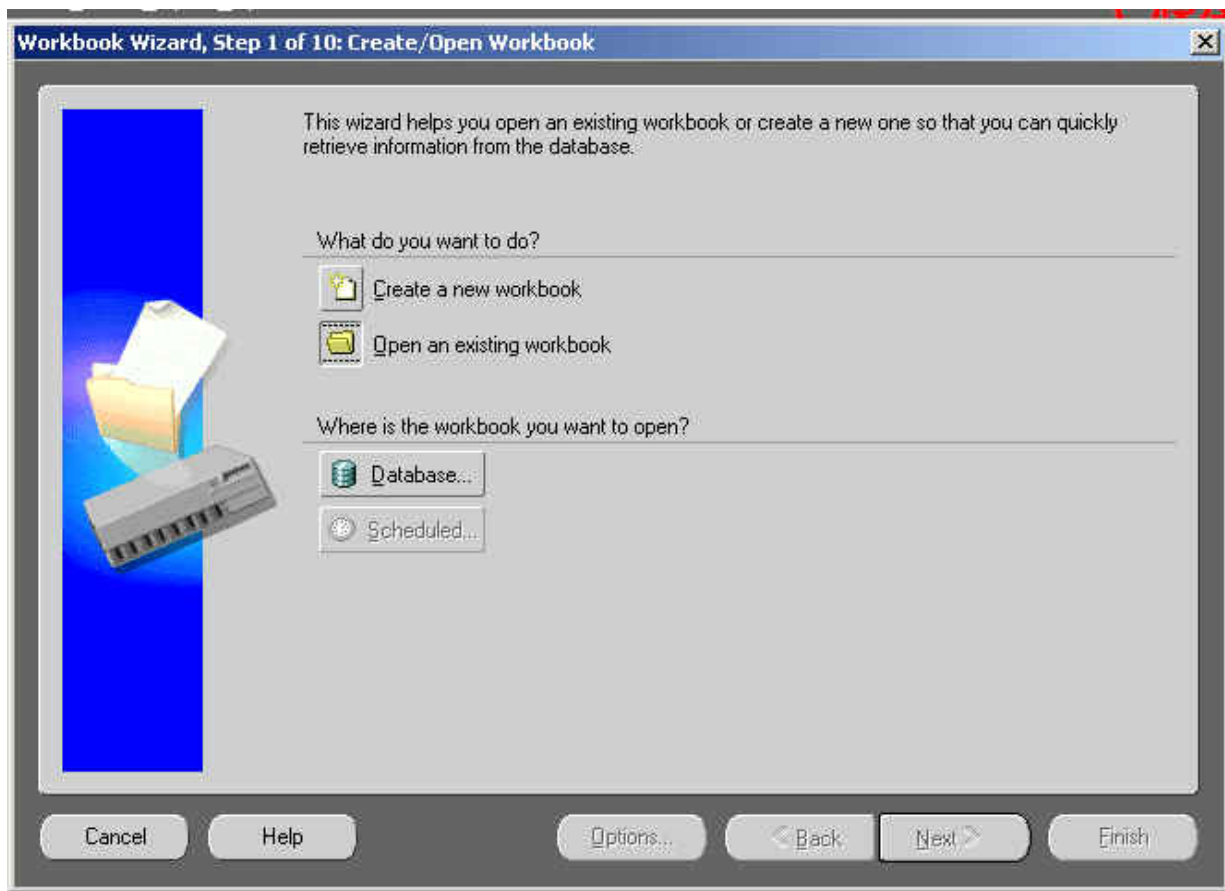
3. Select on the Open an Existing Workbook and select the Database option
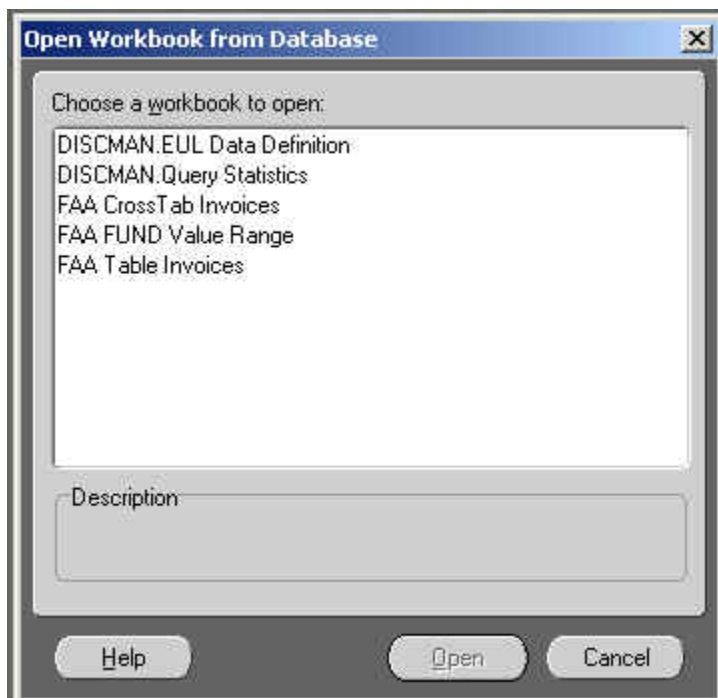
4.   Select the desired workbook from the list of values.
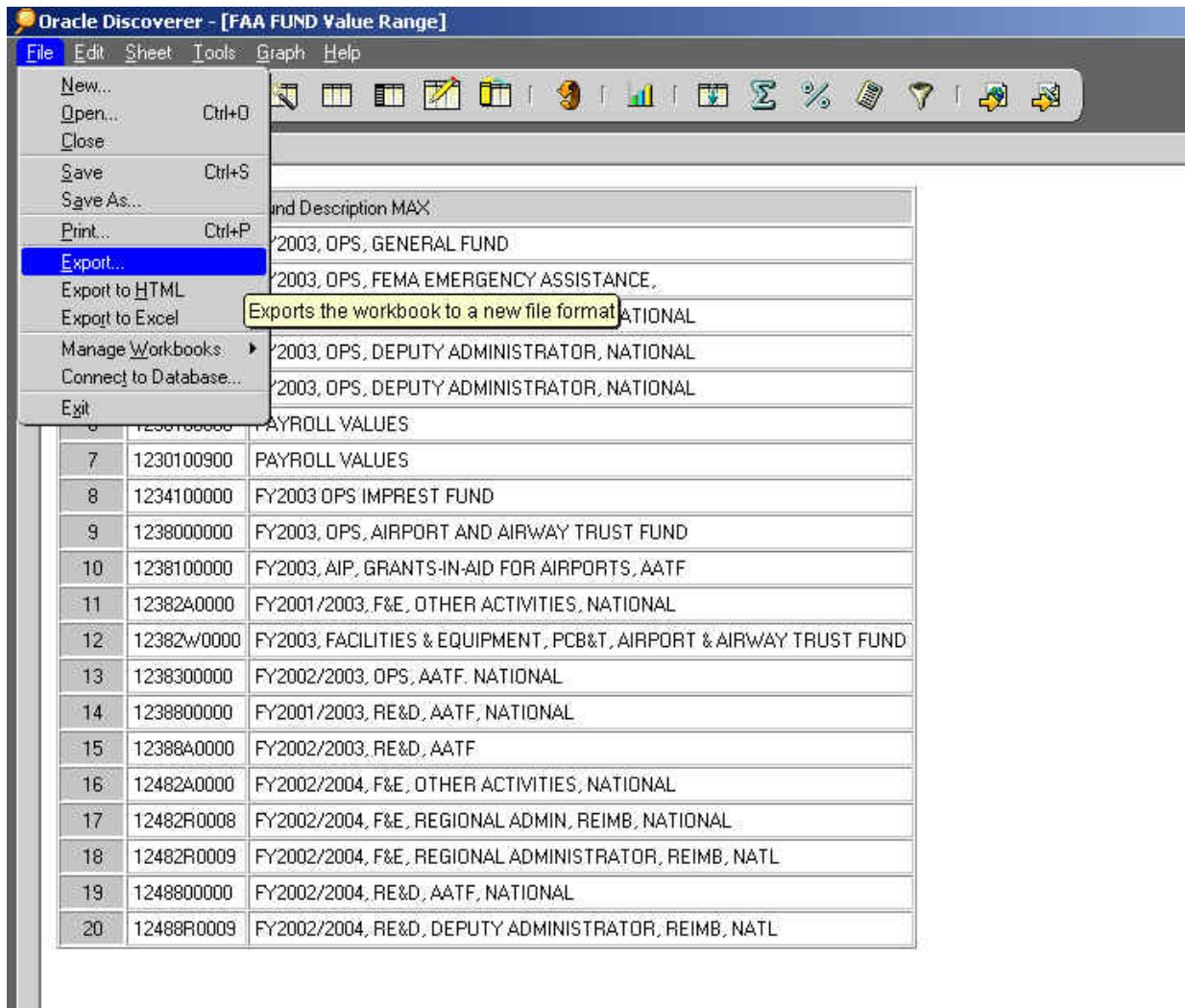
5.   Select (M) File: Export. The Export Wizard dialog box will appear.
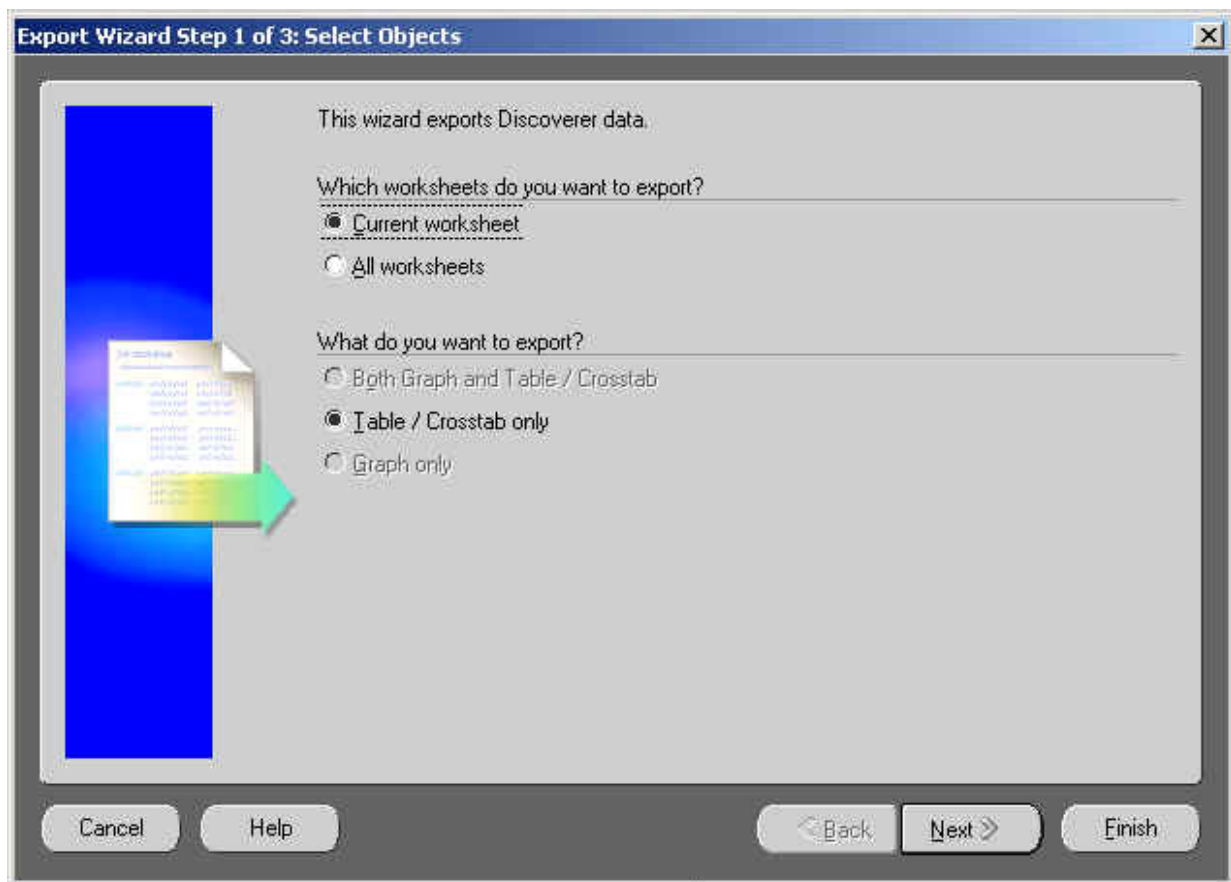
6. Select either the Current worksheet or All worksheets radio button. The Current worksheet radio button will export the active worksheet in the workbook. The entire workbook will export if the All worksheets radio button is selected.

7. Select the radio button that corresponds to what you want to export.

8. Select (B) Next to continue through the Export Wizard.

Exporting a Table or Crosstab Worksheet without a Graph
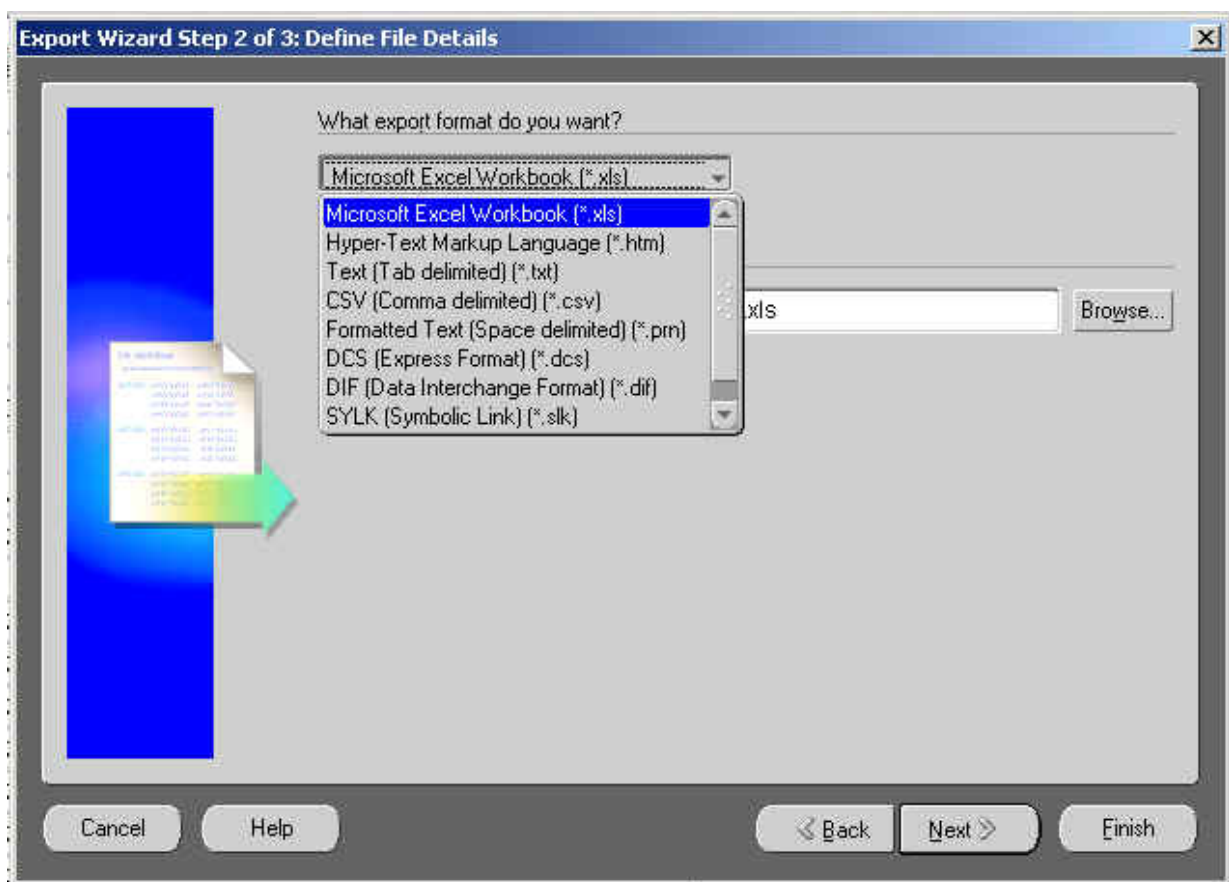
9. Select the export format desired from the dropdown list of values. To export to excel, it is recommended to use CSV (Comma Delimited) (*.csv) format.
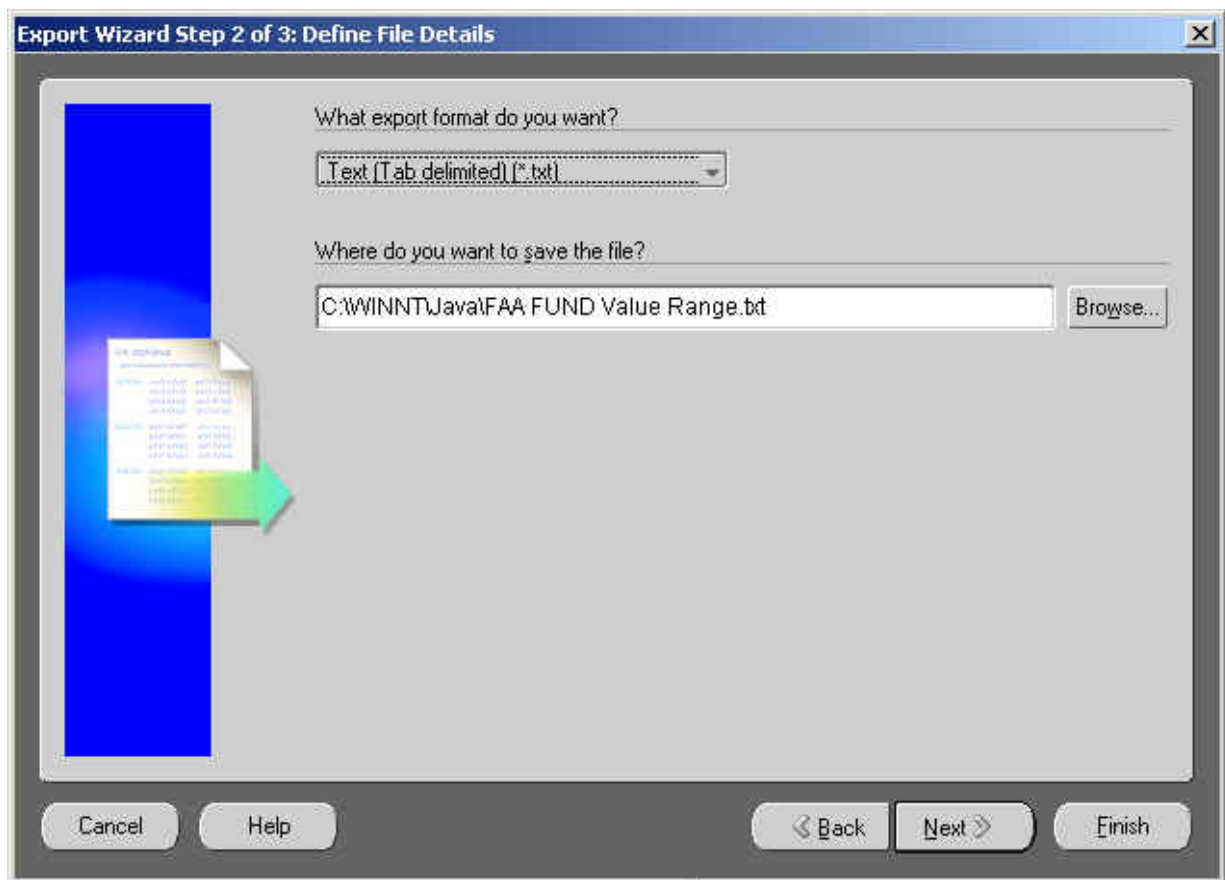
10. Select the location of where to save the file. Accept the default or select the browse button to change the location.

11. Select (B) Next to continue through the Export Wizard.

Using Discoverer 4i Web
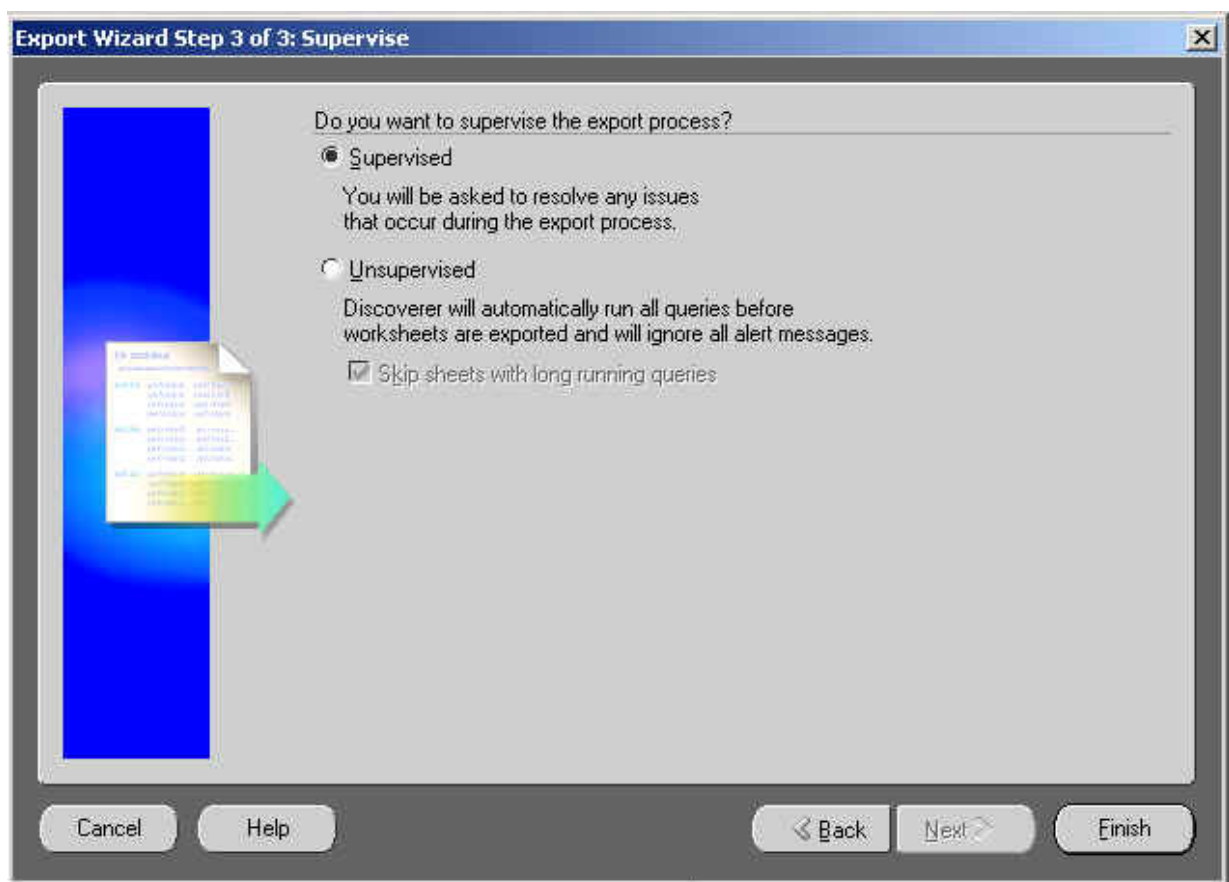
12. Select either the Supervised or Unsupervised radio button. If Supervised is selected, you will receive informational messages that will allow you to interact with the export. If Unsupervised, the export will be executed without any alert messages.

13. Select (B) Finish to execute the export.

Using Discoverer 4i Web
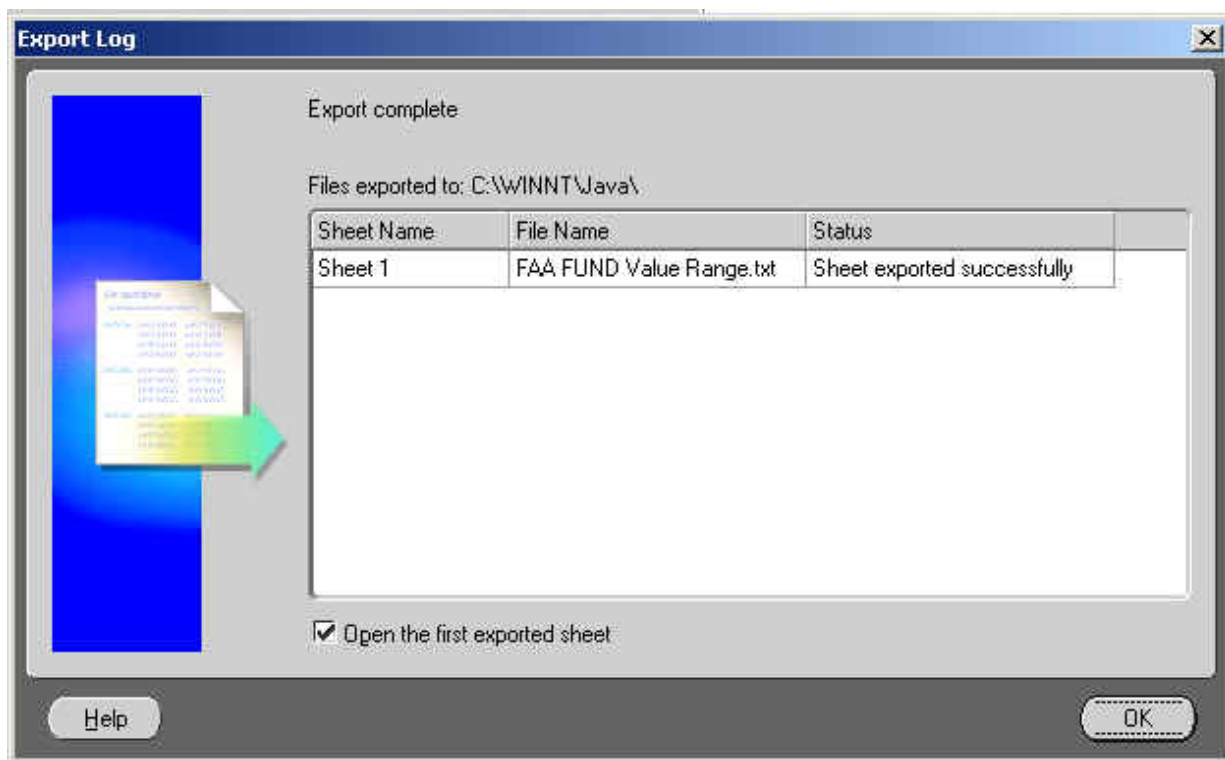
14. An Export Log dialog box will inform you if the export was successful or if the export failed.

15. Select (B) OK.

16. A file download information box will appear. Select (B) OK.

17. Save the file to the desired location.
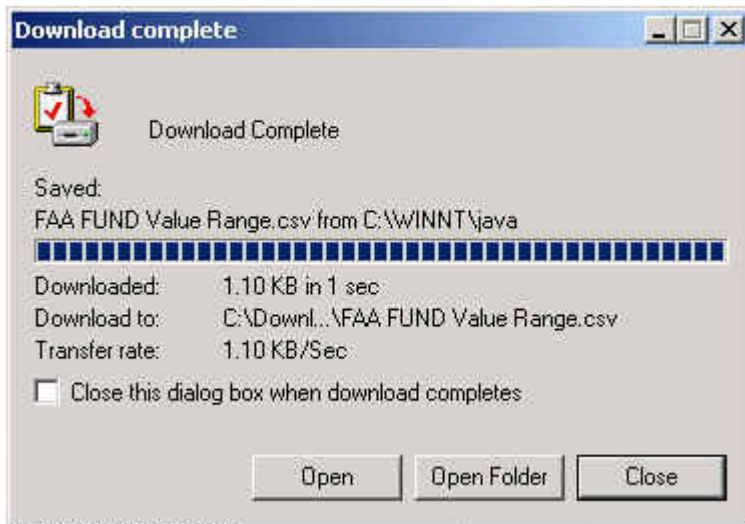
18. A Download complete informational box will appear. Select either Open or Open Folder to view the file.

Using Discoverer 4i Web

19. View your report in the Microsoft Excel application. The data can be manipulated using the MS Excel tools.

Exporting a Table or Crosstab Worksheet with a Graph

Graphs can be exported to the following formats:

- GIF: Use in other applications. For example, import the graph to a slide and use it in a presentation.

- HTML: View graphs when using a web browser.

Exporting into HTML Format or GIF Format to be View With Internet Browser

Export Wizard Step 1 of 4: Select Objects

This wizard exports Discoverer data.

Which worksheets do you want to export?
- ⦿ Current worksheet
- ○ All worksheets

What do you want to export?
- ⦿ Both Graph and Table / Crosstab
- ○ Table / Crosstab only
- ○ Graph only

Cancel   Help   Back   Next   Finish
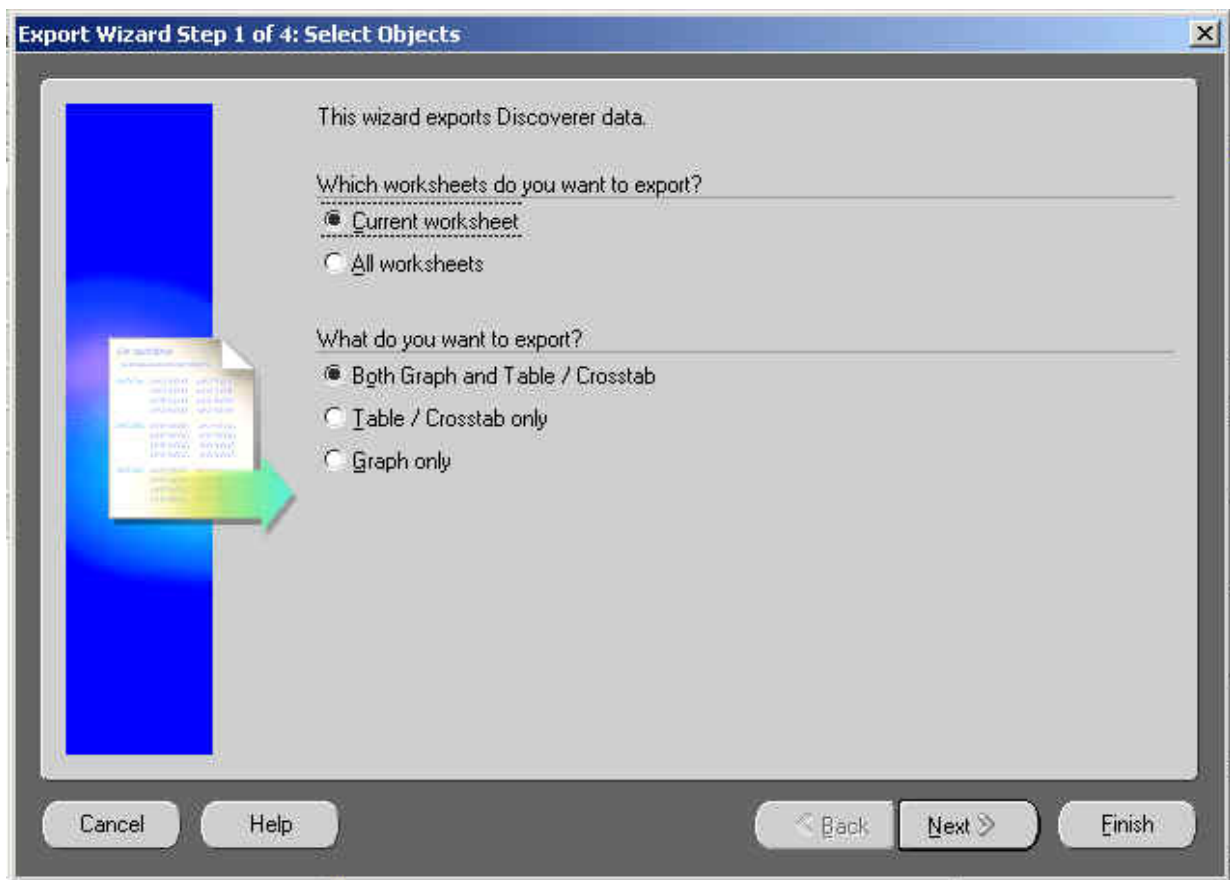
20. Select (M) File: Export. The Export Wizard dialog box will appear.

21. Select either Graph Only or Worksheet and Graph.

    Note: Shift, left click to select worksheet and graph. Highlighting should appear around the selected areas.

22. Select (B) Next to continue with the export wizard.

Export Wizard Step 2 of 4: Define File Details

What export format do you want?

Hyper-Text Markup Language (*.htm)

Where do you want to save the file?

C:\WINNT\Java\FAA CrossTab Invoices Graph.htm   Browse...

Cancel   Help   Back   Next   Finish
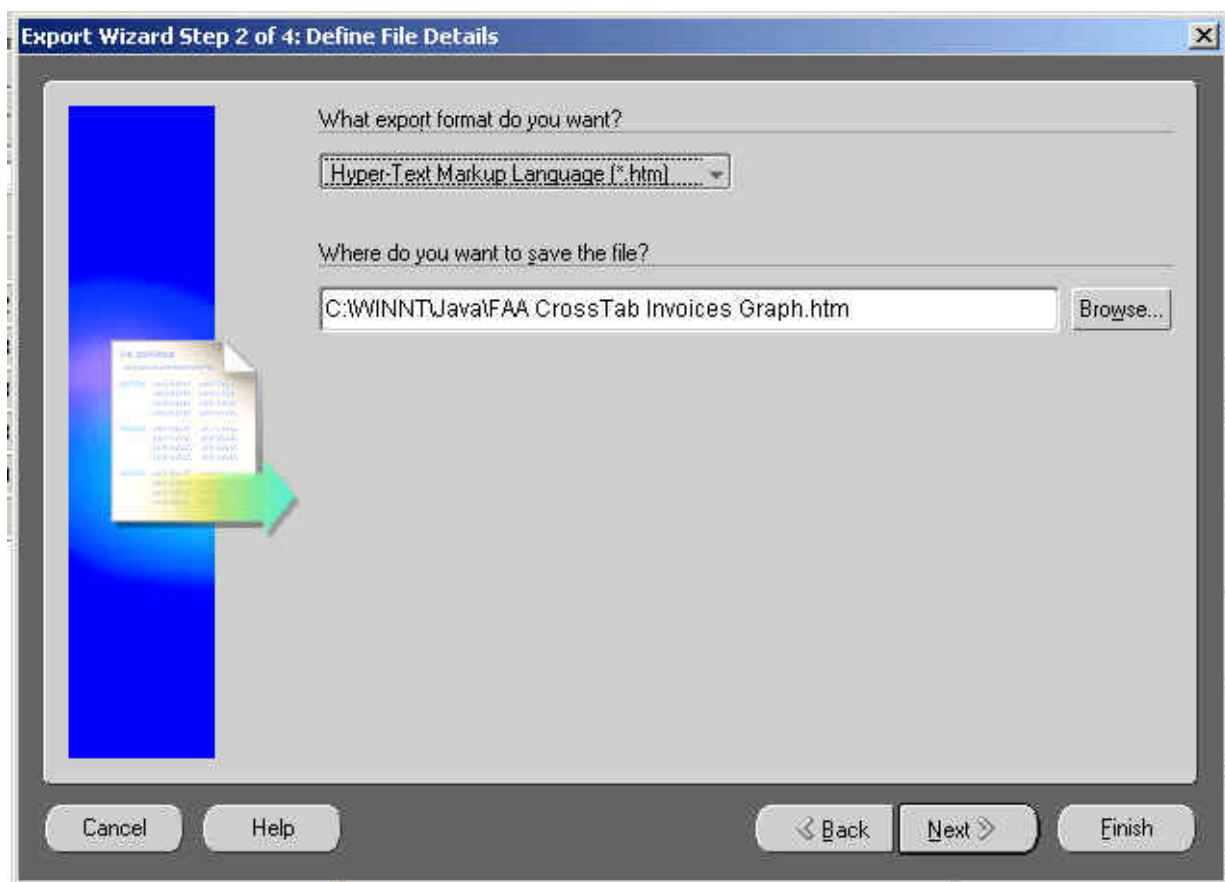
23. Select the desired export format and the location of where the file is to be saved.

24. Select (B) Next to continue with export wizard.
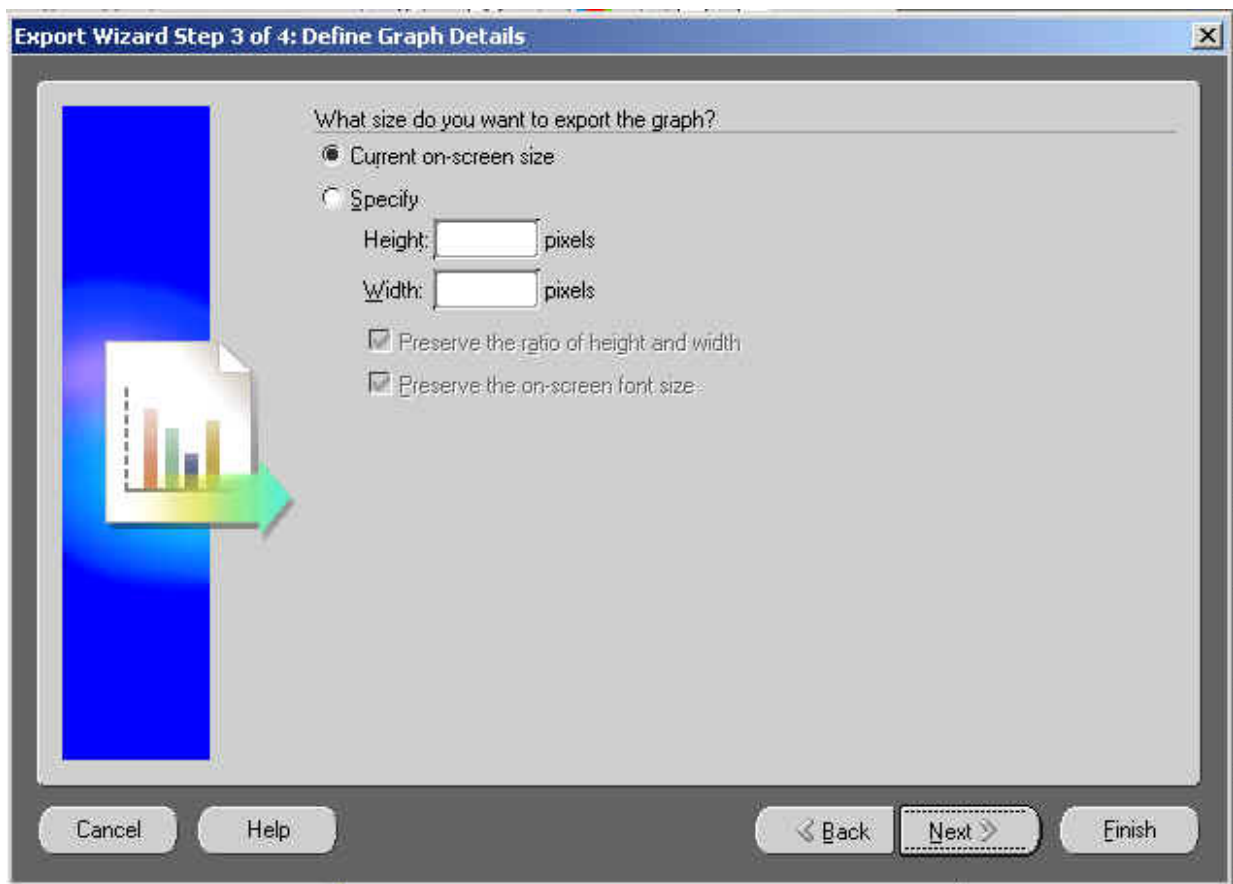
25. Select the size you want the graph to be exported as. Select from current size or specify the height and width.

26. Select (B) Next to continue with the export wizard.
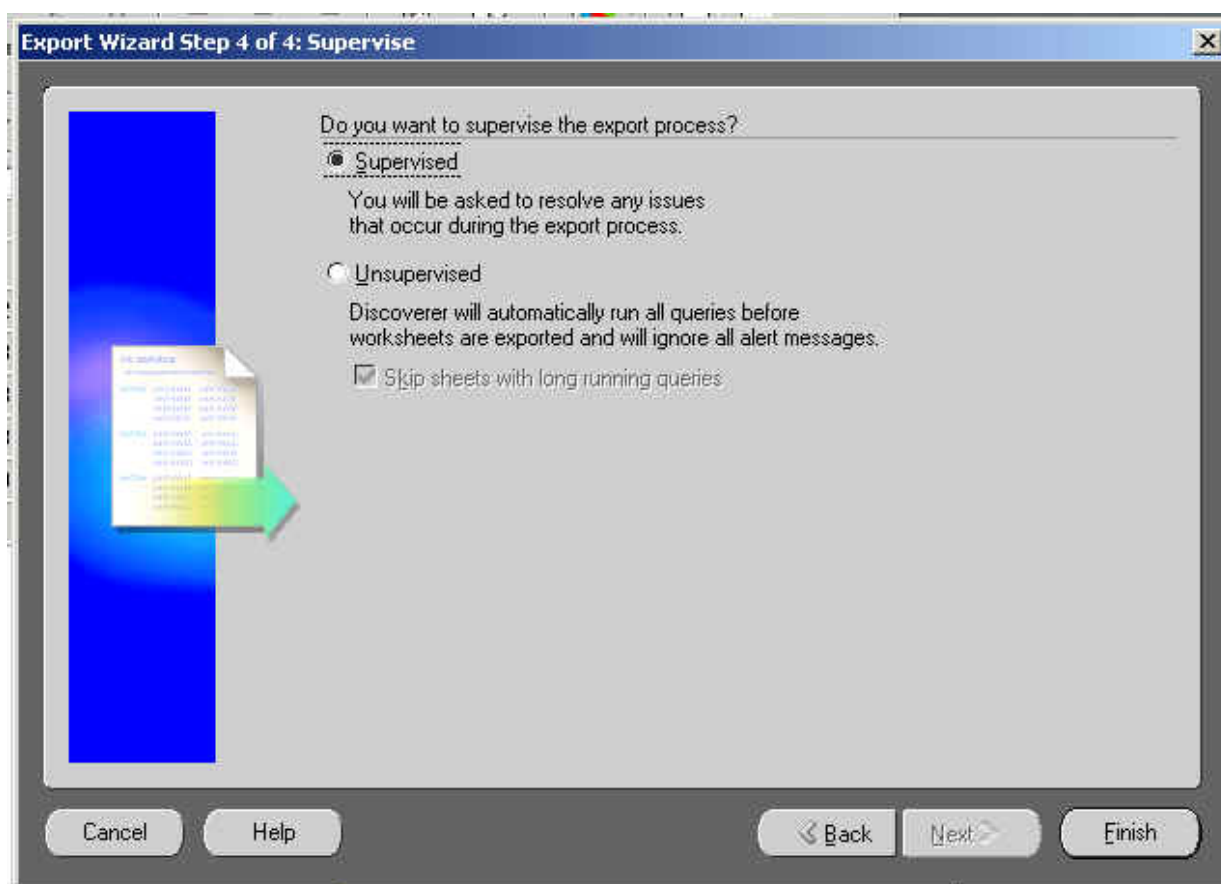
27. Select either the Supervised or Unsupervised radio buttons. If Supervised is selected, you will receive informational messages that will allow you to interact with the export. If Unsupervised is selected, the export will be executed without any alert messages.

28. Select (B) Finish to start the export process.

Using Discoverer 4i Web
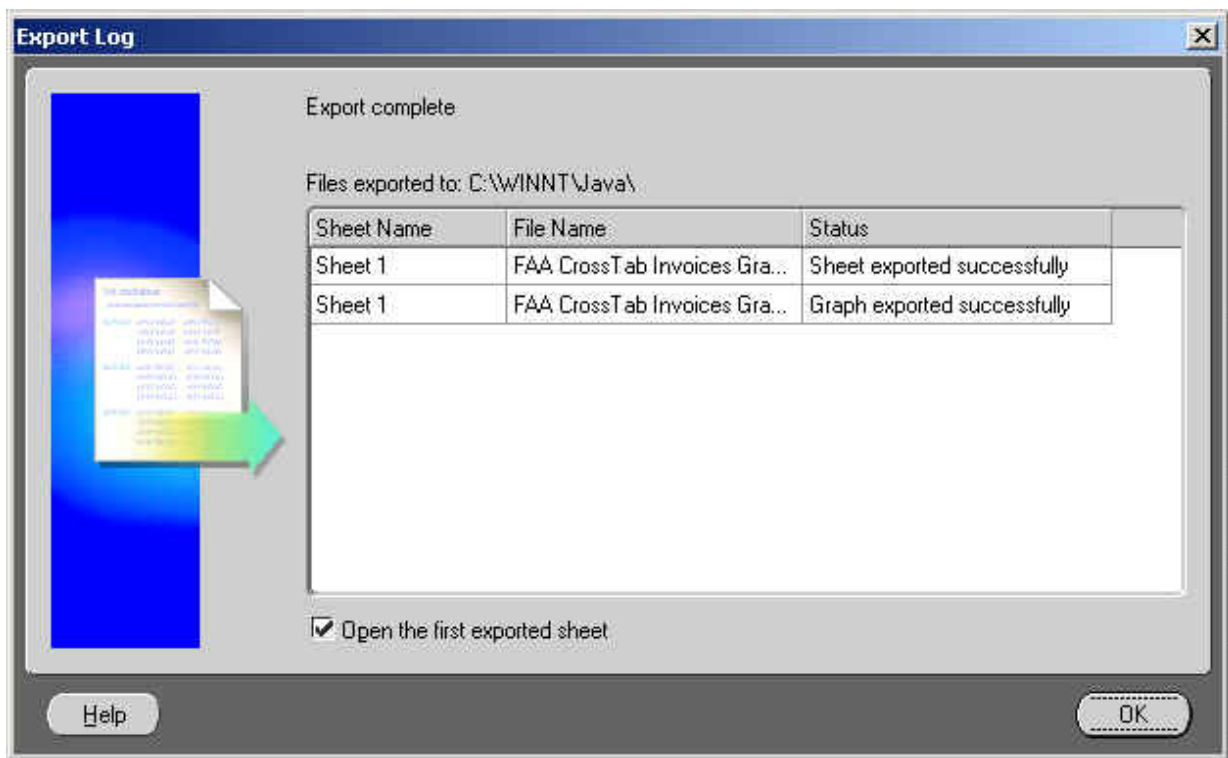
29. An Export log dialog box will inform you if the export was successful or if it failed. Select (B) OK.
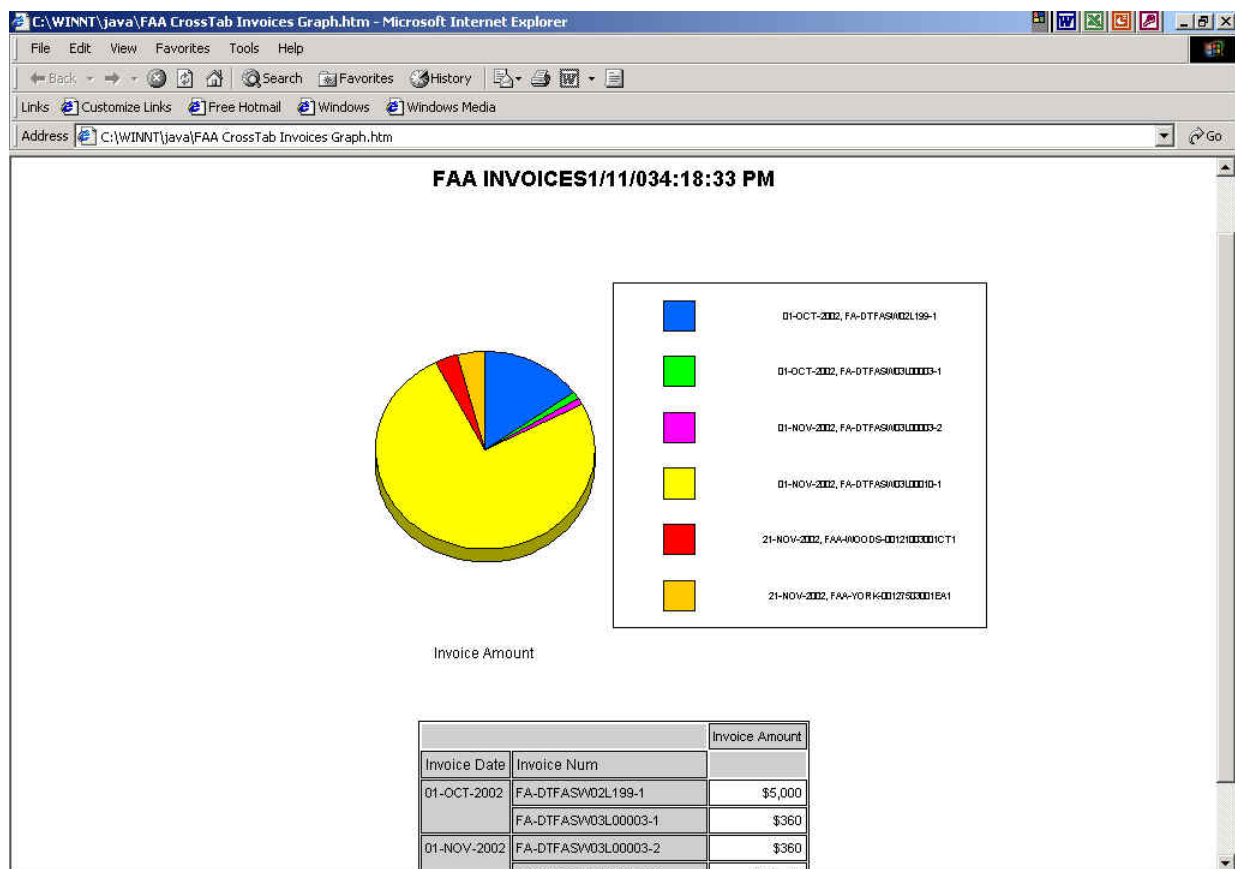
30. View the graph layout with your Internet Browser.

Lab 1: Creating and Exporting a Graph

Instructions

You are asked to create a graphical view from a previously saved workbook.

Refer back to the XX Table Layout LAB2 Workbook. Display as follows:

- Limit to be set on the Invoice Dates

- Invoices from the timeframe of 12-MAR-2000 between 17-MAR-2000 only

- Sort invoice dates from low to high

- Add percentages to display the percentage of invoice amounts

- Add a grand total for invoice amount at the end of the report

- Pie Chart with a title of March 2000 Invoice shows:

  - Grand total for invoice amount

  - Group series by rows

- Legend at the bottom of the workbook displaying only invoice amount

Export this graph and worksheet to the Internet Browser for everyone to view.

Do not exit the workbook.

Lab 1 Solutions: Creating and Exporting a Graph
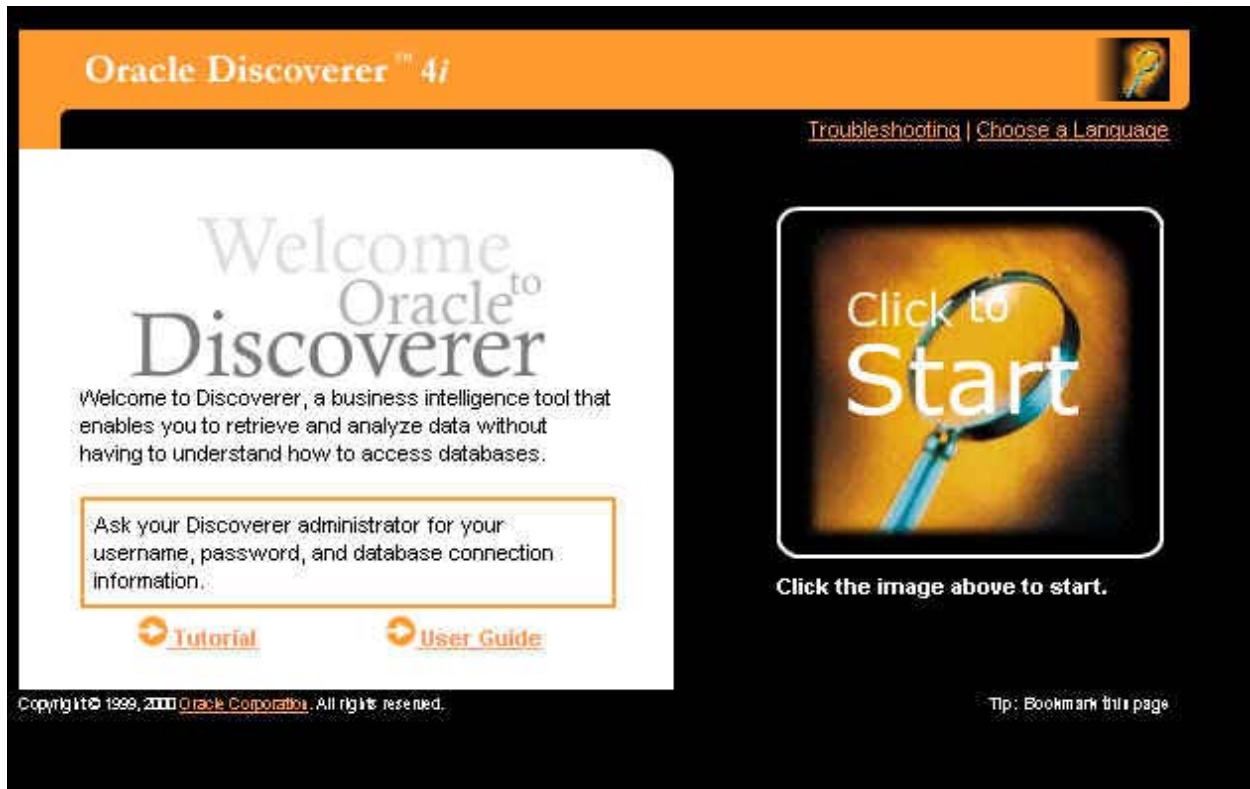
1. Access the Discoverer 4i Web tool.

    N → Internet Explorer –
    http://disoverdelphi.dot.gov:7779/discwb4/html/english.ms_ie/start_ie.htm

2. Select Start.

Lab 1 Solutions: Creating and Exporting a Graph

3.   Enter Username, Password and Database assigned by the instructor.
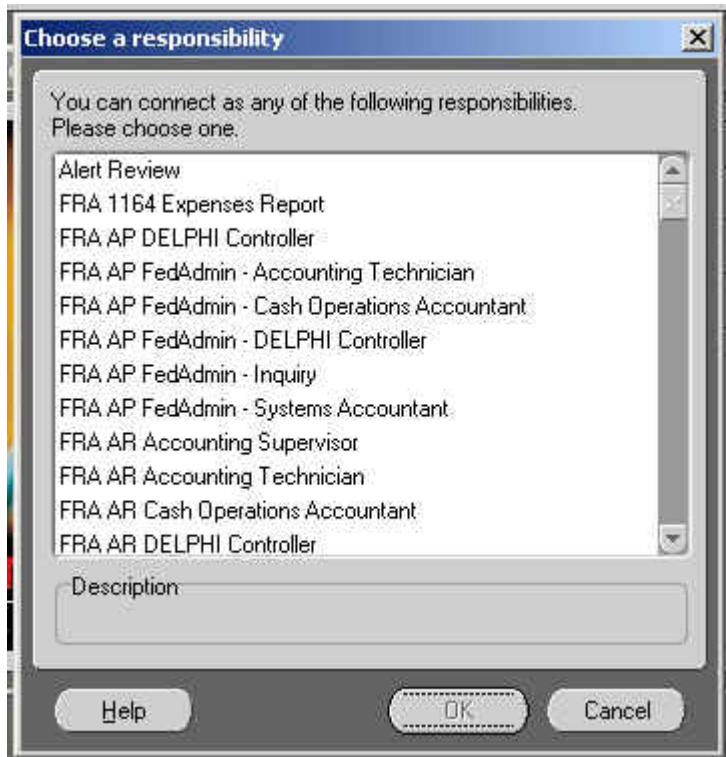
4.   Select the Training Responsibility assigned by the instructor.

Using Discover 4i Web

Lab 1 Solutions: Creating and Exporting a Graph
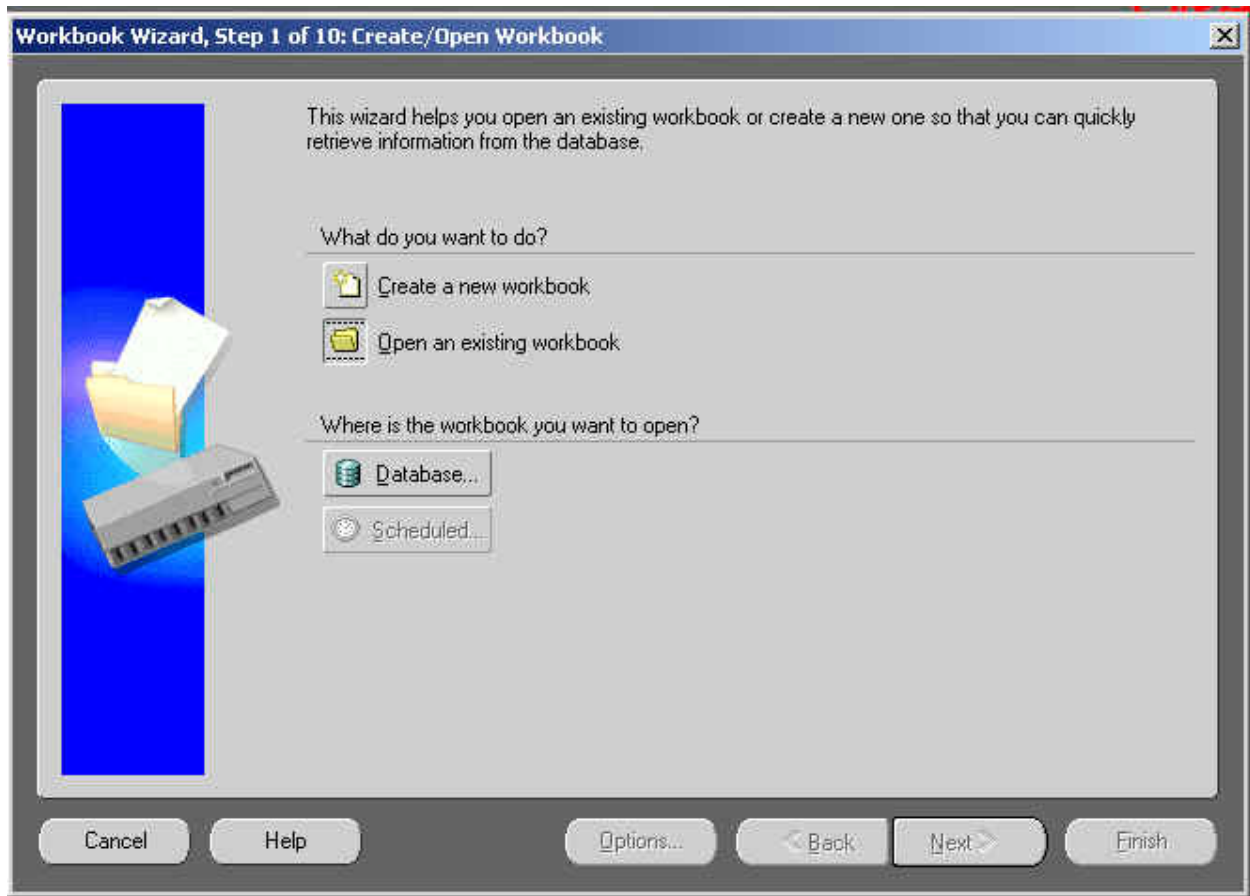
5. Select the Open an Existing workbook Icon. Choose from Database.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph
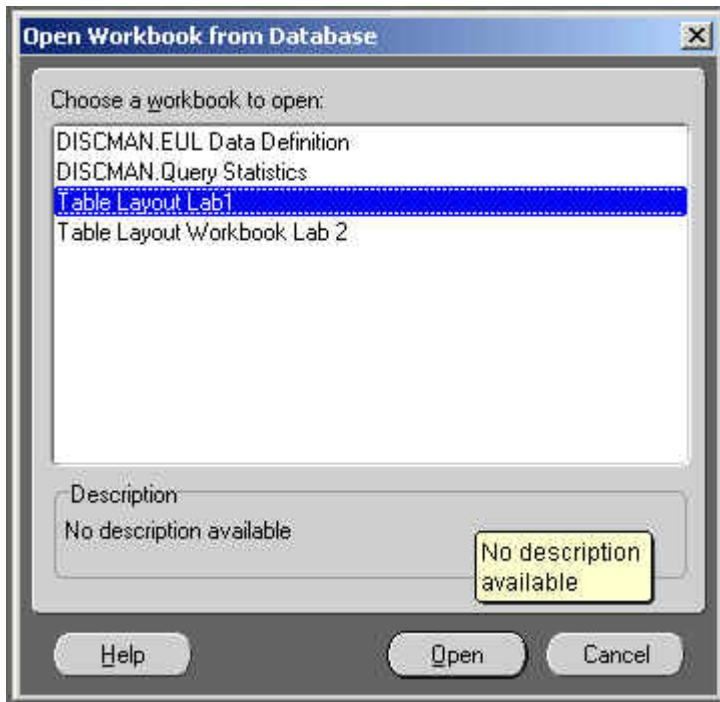
6.   Select the XX Table Layout Lab1 Workbook from the list of values. Select Open.

Lab 1 Solutions: Creating and Exporting a Graph
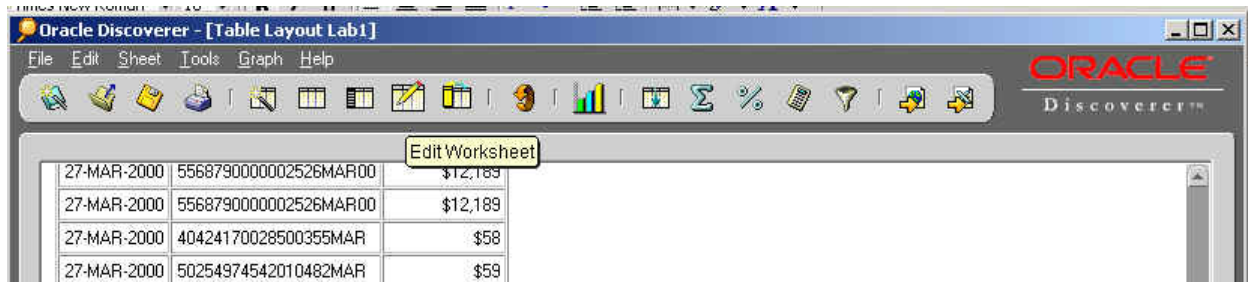
7. Select the Edit Worksheet Icon from the Toolbar.
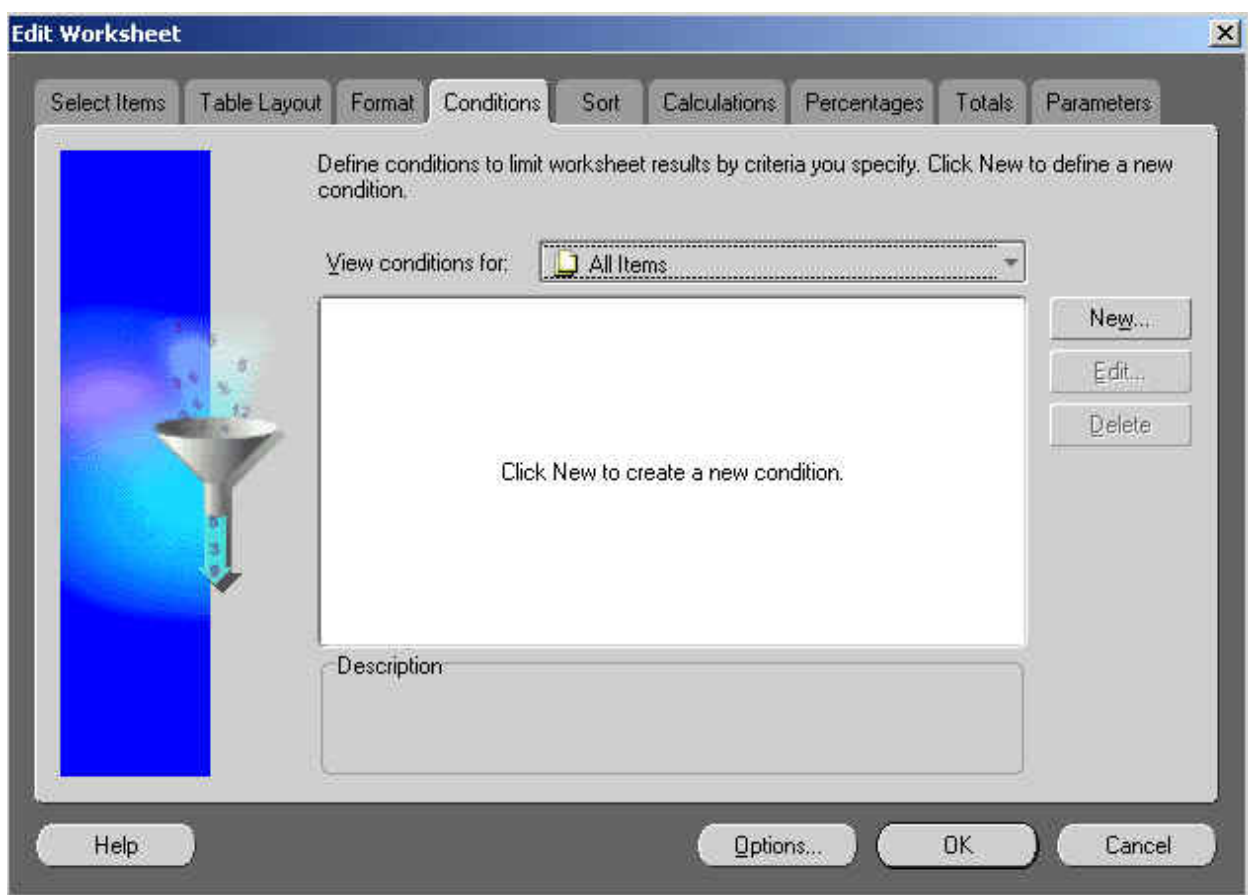
8. Select the Conditions tab from the Edit worksheet dialog box.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph
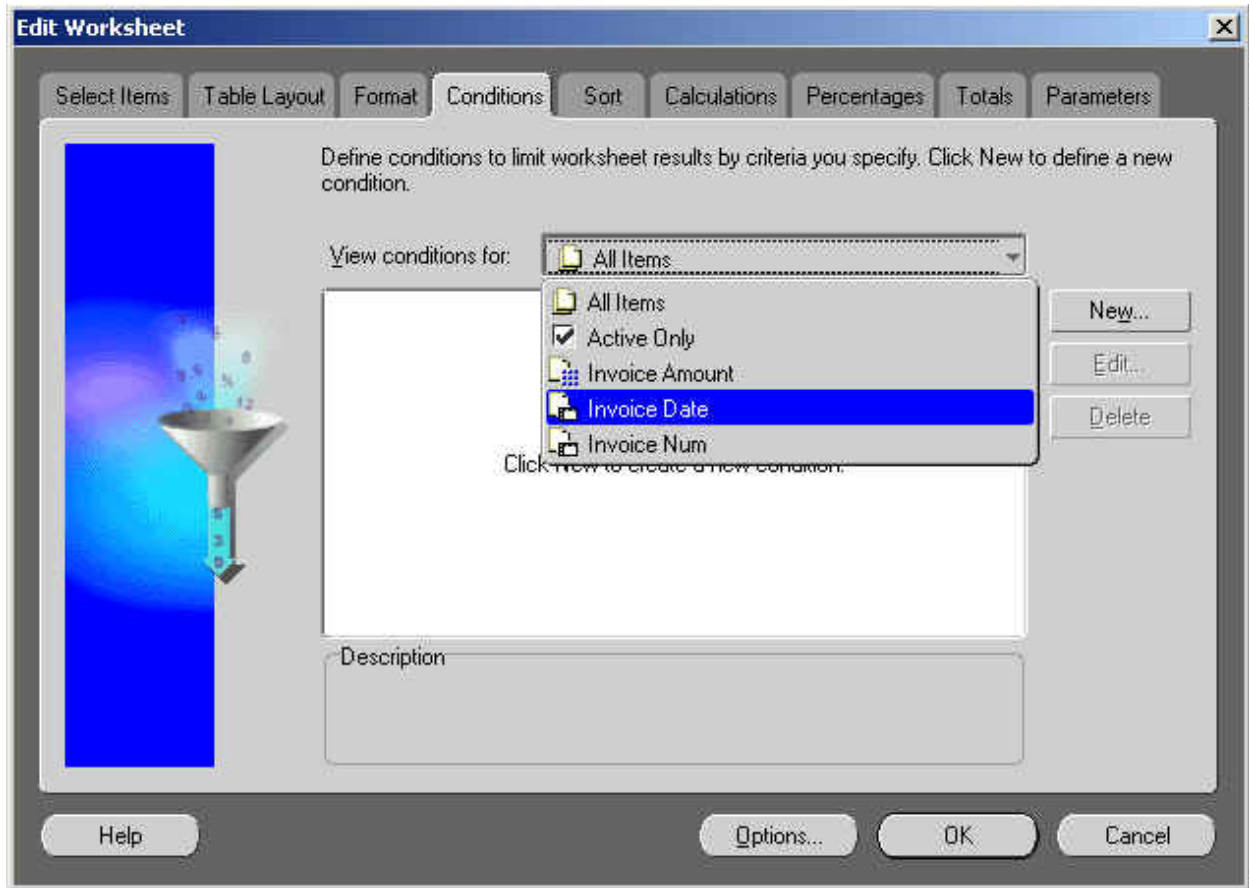
9. Select Invoice Date from the drop-down box "View Conditions For". Select (B) New.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph
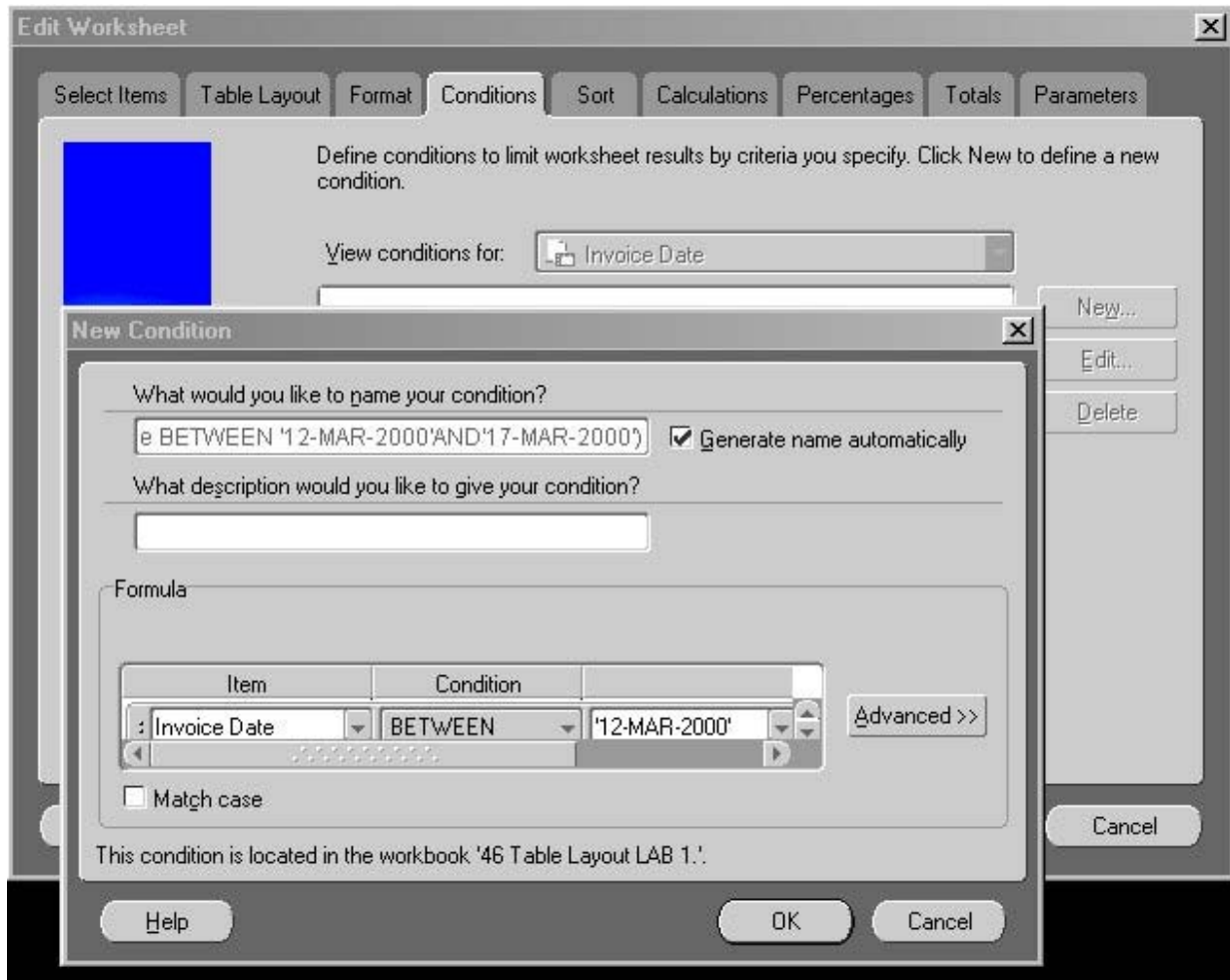
10. Under the Item tab select from the list of values, Accounts Payable Payments Invoice Date.

11. Select Between from the list of values under the Condition box.

12. Under Values, type "12-MAR-2000" in the first field and "17-MAR-2000" in the second field.

    Hint: Remove check from Match case checkbox.

13. Select OK.

Lab 1 Solutions: Creating and Exporting a Graph
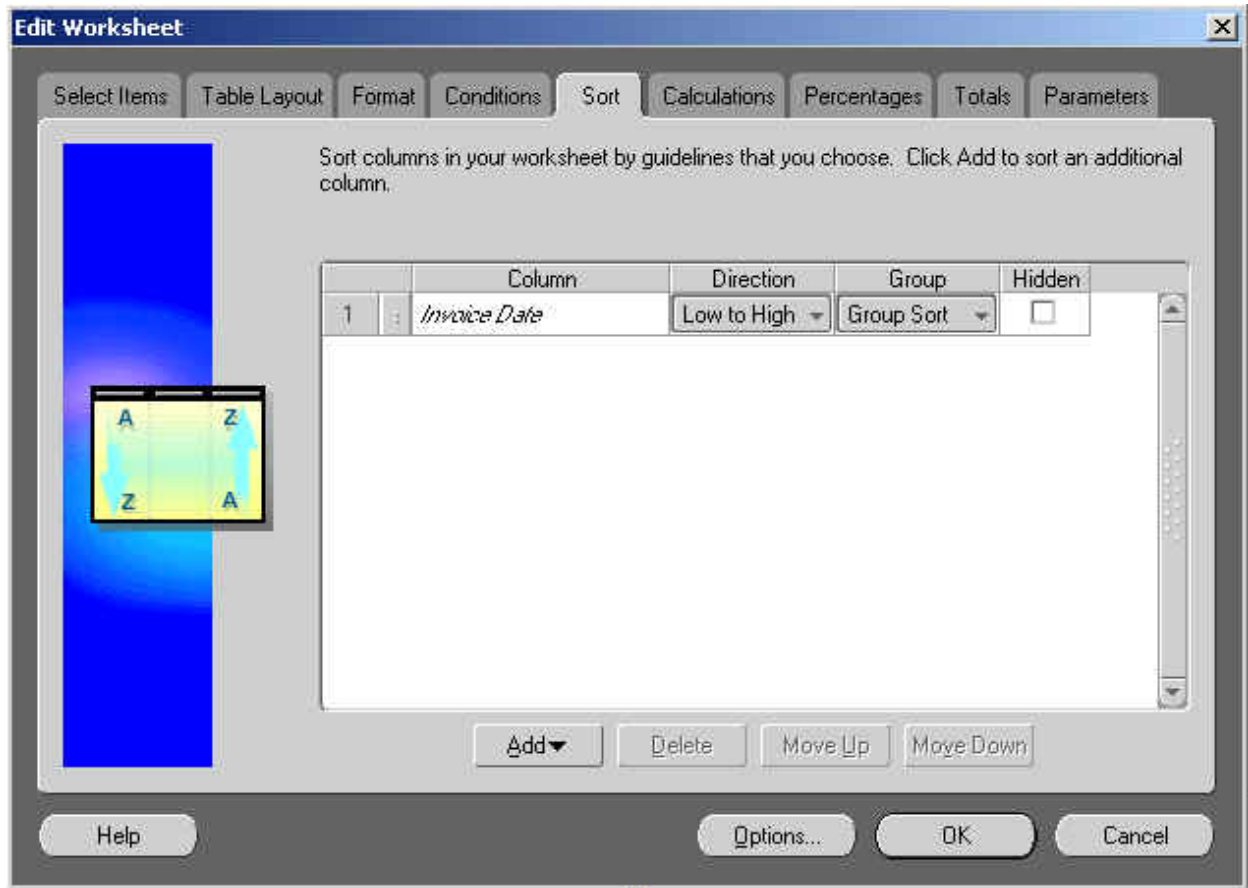
14. Select the Sort tab. Choose (B) Add. If Invoice Date is not already selected, select it from the list of values. Select Low to High under the Direction box.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph
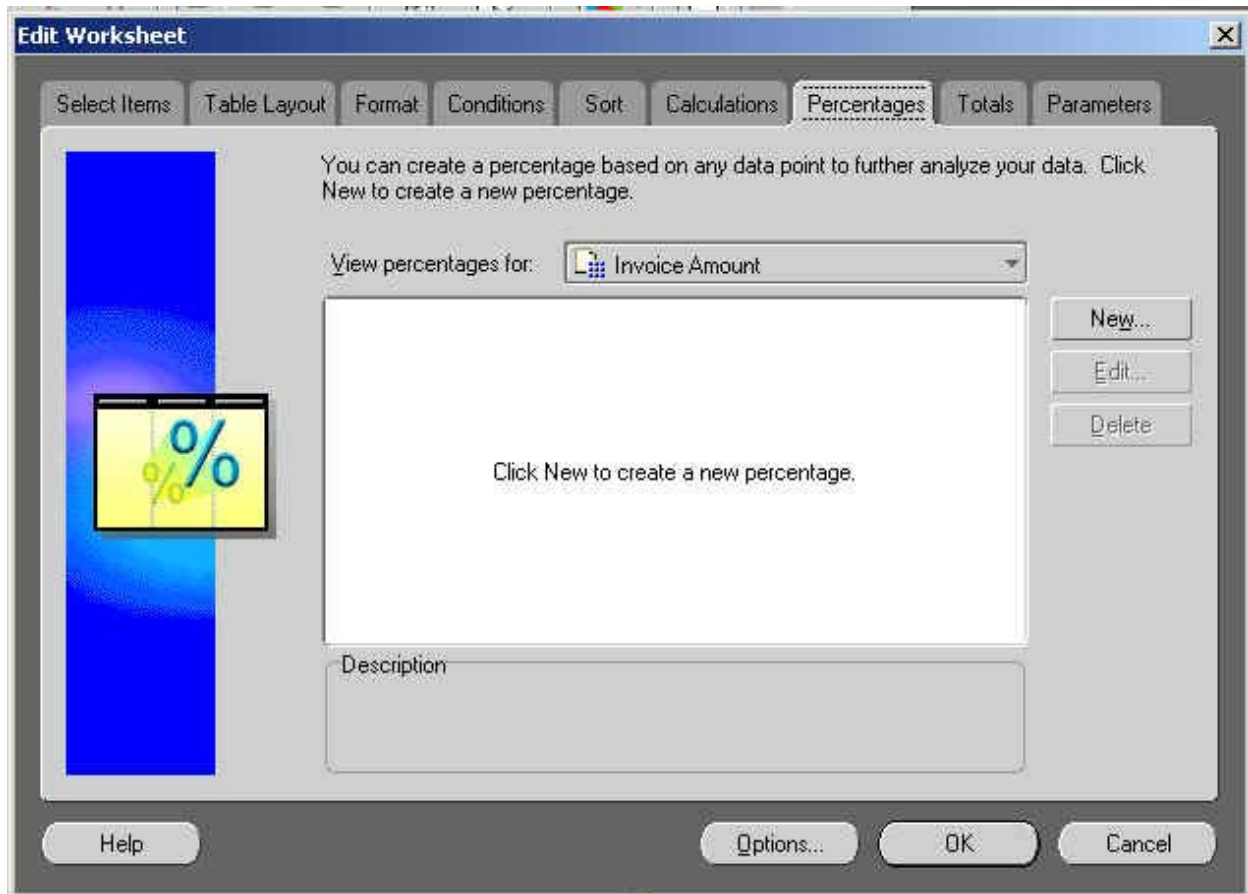
15. Select the Percentages tab. Select Invoice Amount from the "View Percentages For" drop-down list. Select (B) New.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph

16. Accept default values and select (B) OK.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph
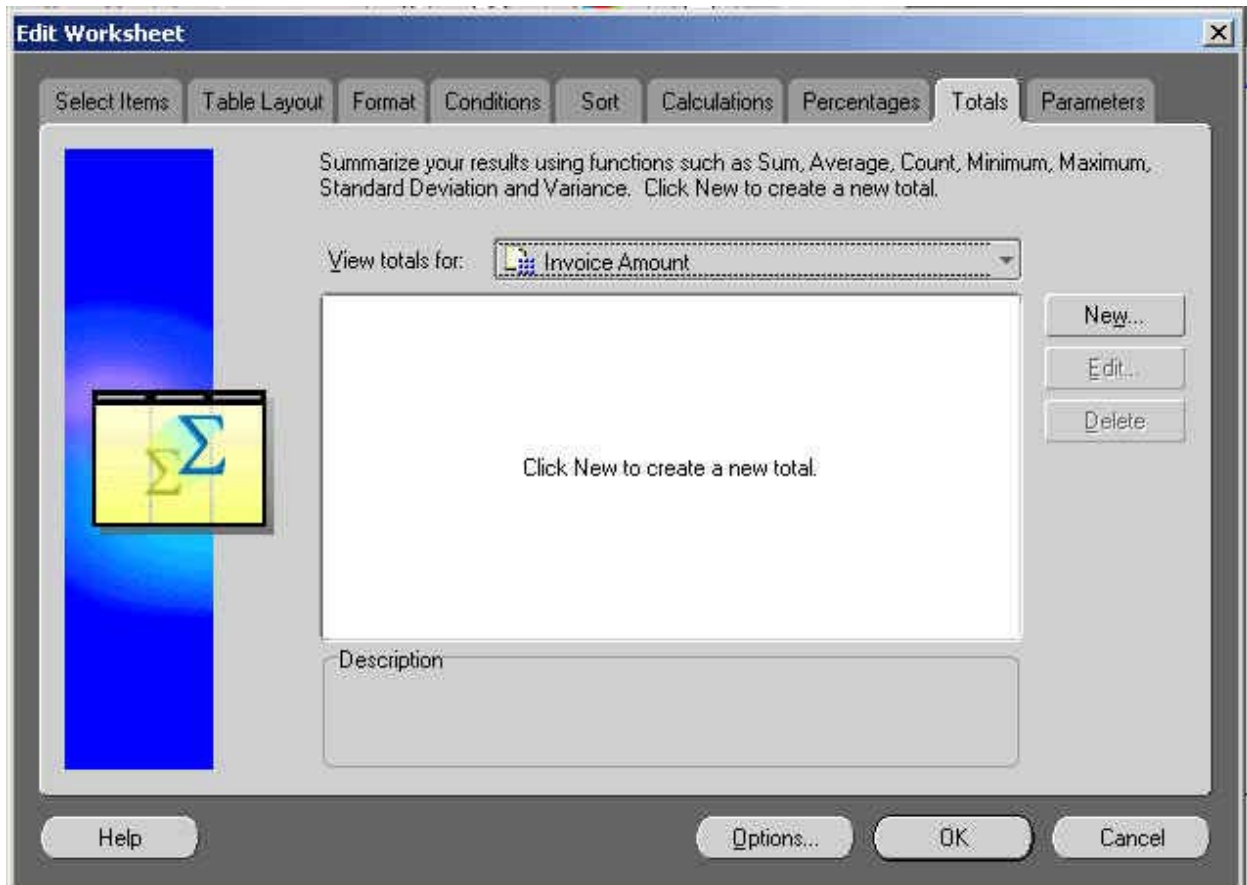
17. Select the Totals tab. Choose Invoice Amount from the drop-down menu for "View Totals For". Select (B) New.

Lab 1 Solutions: Creating and Exporting a Graph

18. Accept the default value setup. Select OK.

Lab 1 Solutions: Creating and Exporting a Graph

19. Select OK to execute the query for the workbook.
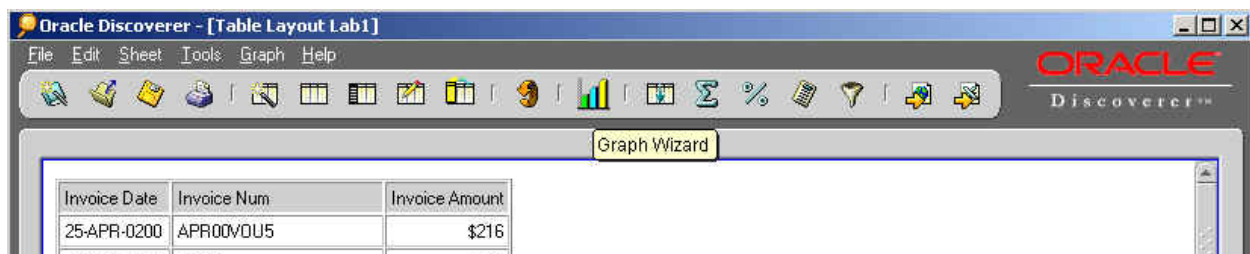
20. Choose the Graph Wizard tool from the Toolbar.

Lab 1 Solutions: Creating and Exporting a Graph
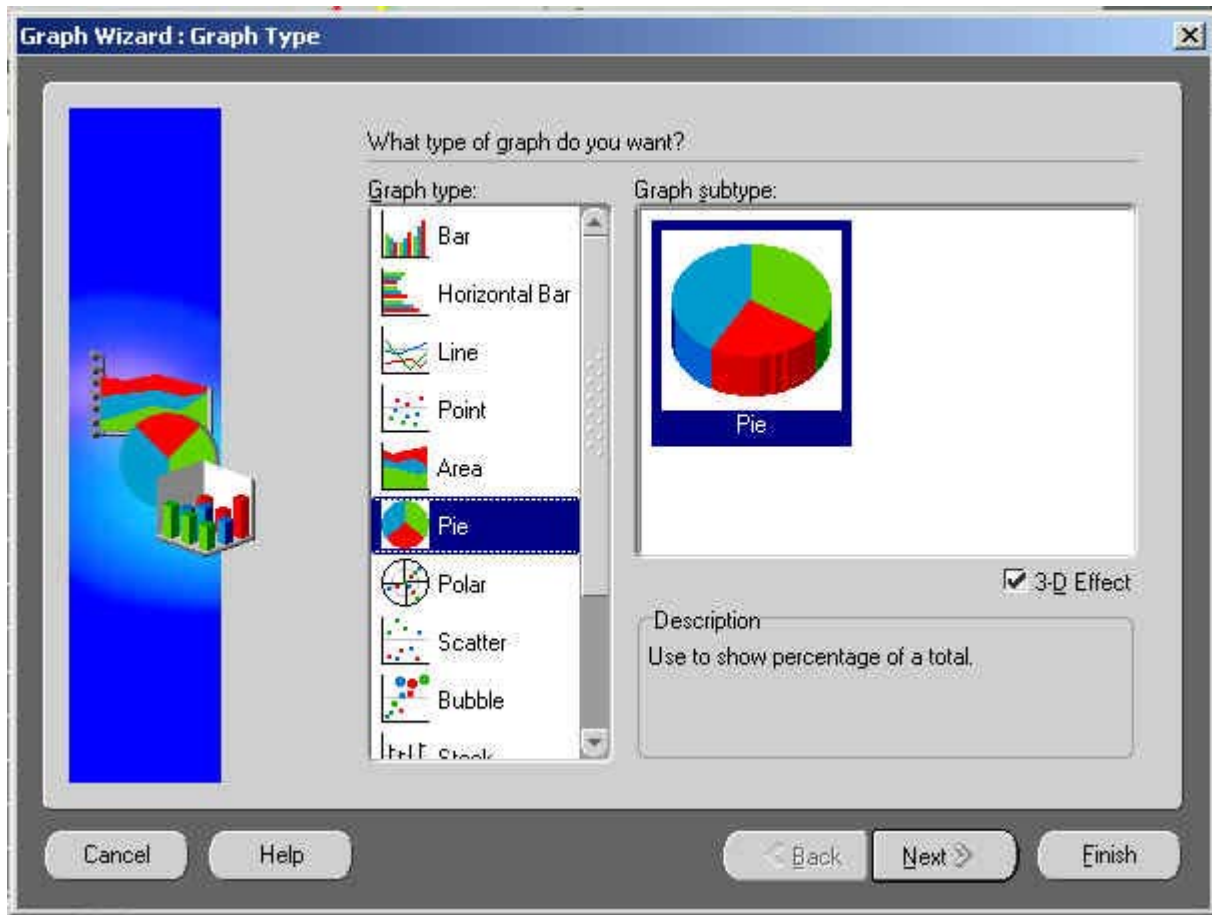
21. Select Pie Chart from the list of values on the left. Choose Next to continue.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph

22. Check the Show Title box. Type in the Title Box "March 2000 Invoices". Select the "Both Data and totals" radio button. Display series by Rows. Select (B) Next.

23. Select Plot Area tab. Accept all default information.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph
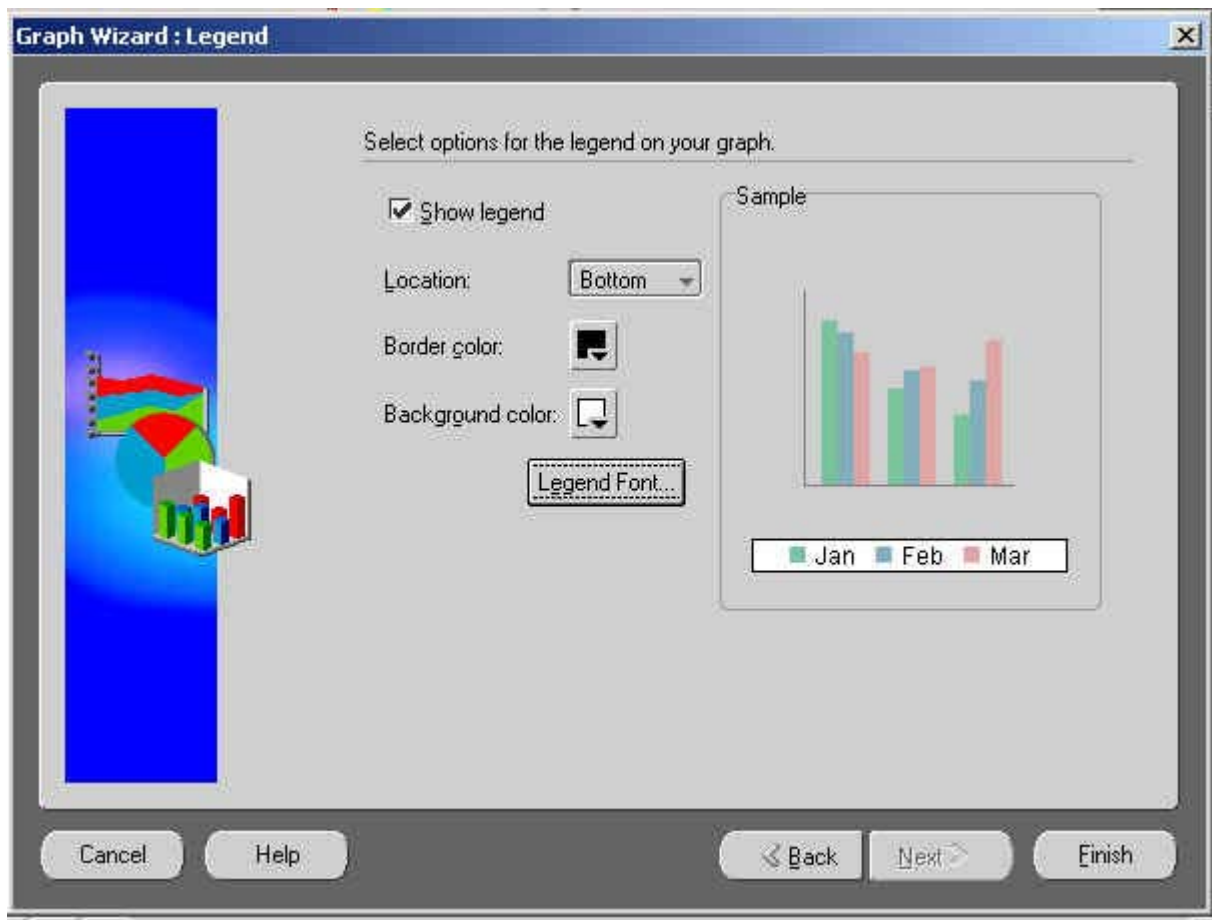
24. Move the legend from the right to the bottom of the workbook.

25. Select Finish to display the workbook with a graph.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph
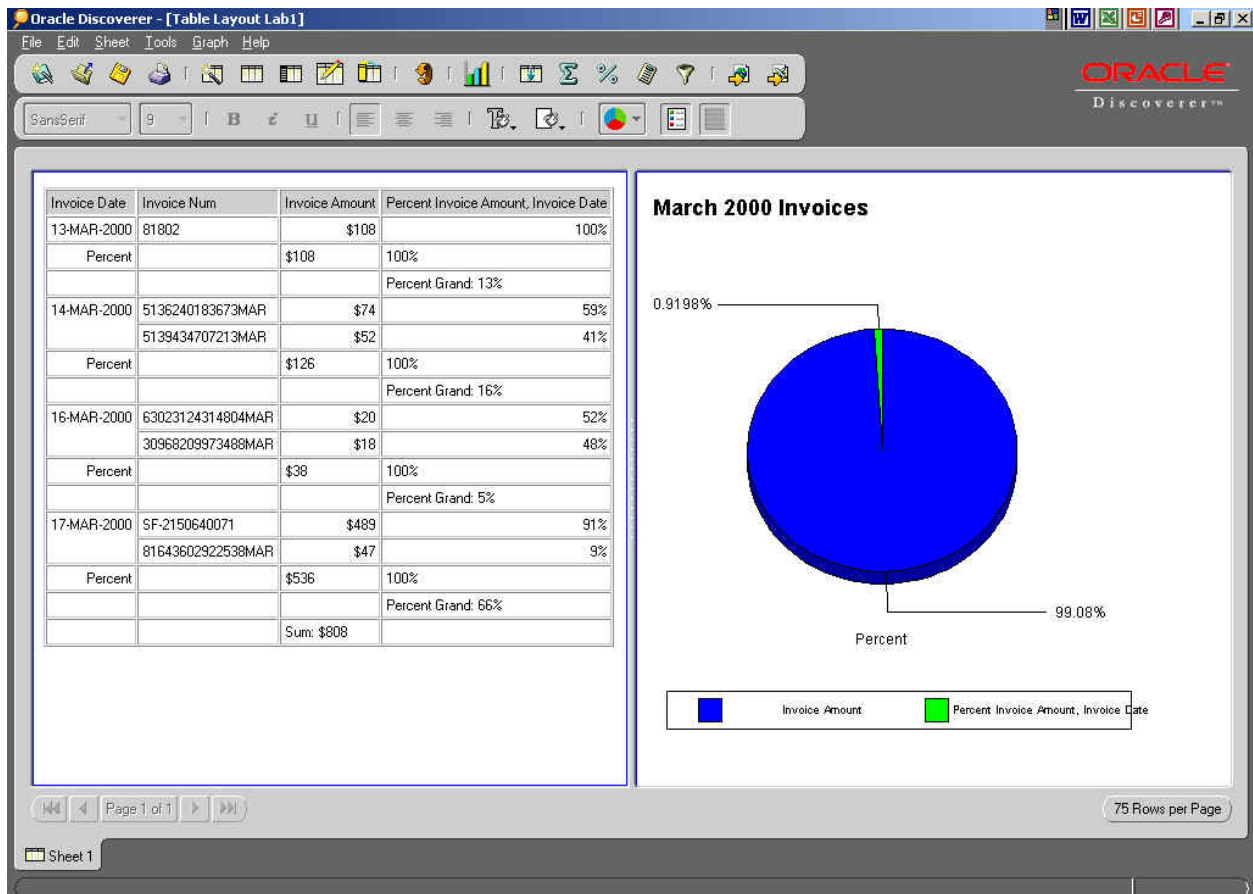
26. Select both the worksheet and the graph by using mouse and holding the shift key on the keyboard down. Both should display with a color border around them, this means they are selected.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph
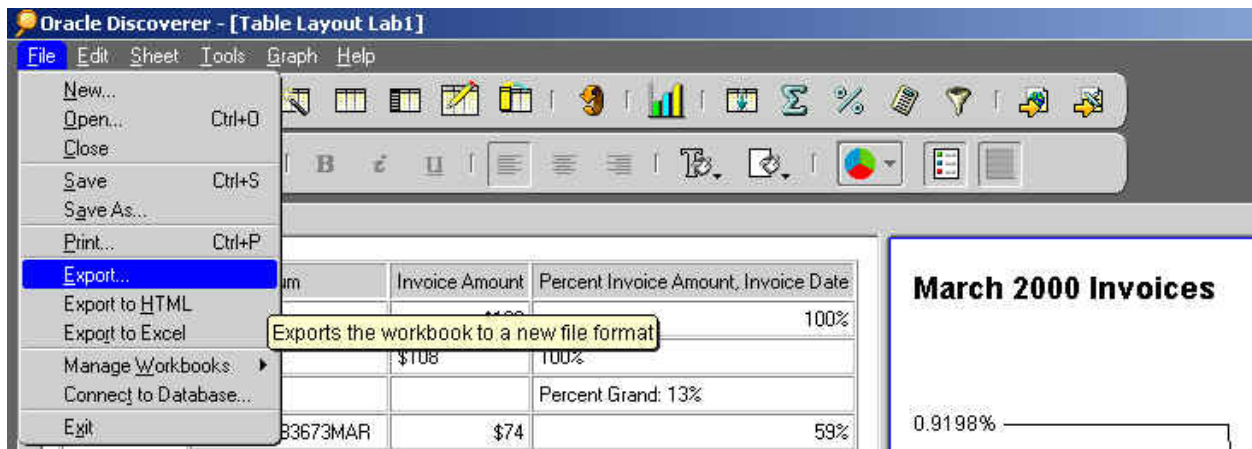
27. Select (M) File Export from the Menu Bar.
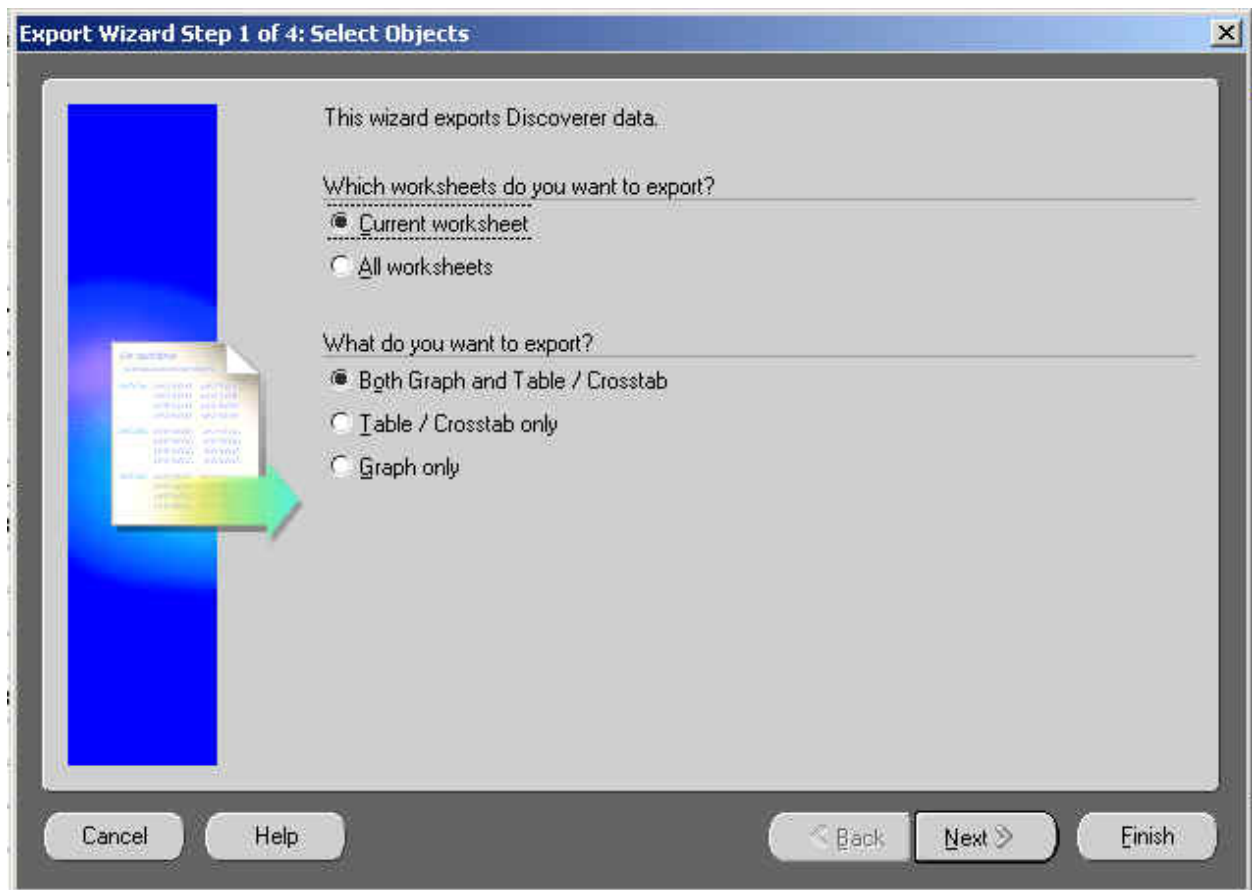
28. The Export Wizard dialog box will appear. Choose to export the Worksheet and the Graph. Select (B) Next.

Lab 1 Solutions: Creating and Exporting a Graph
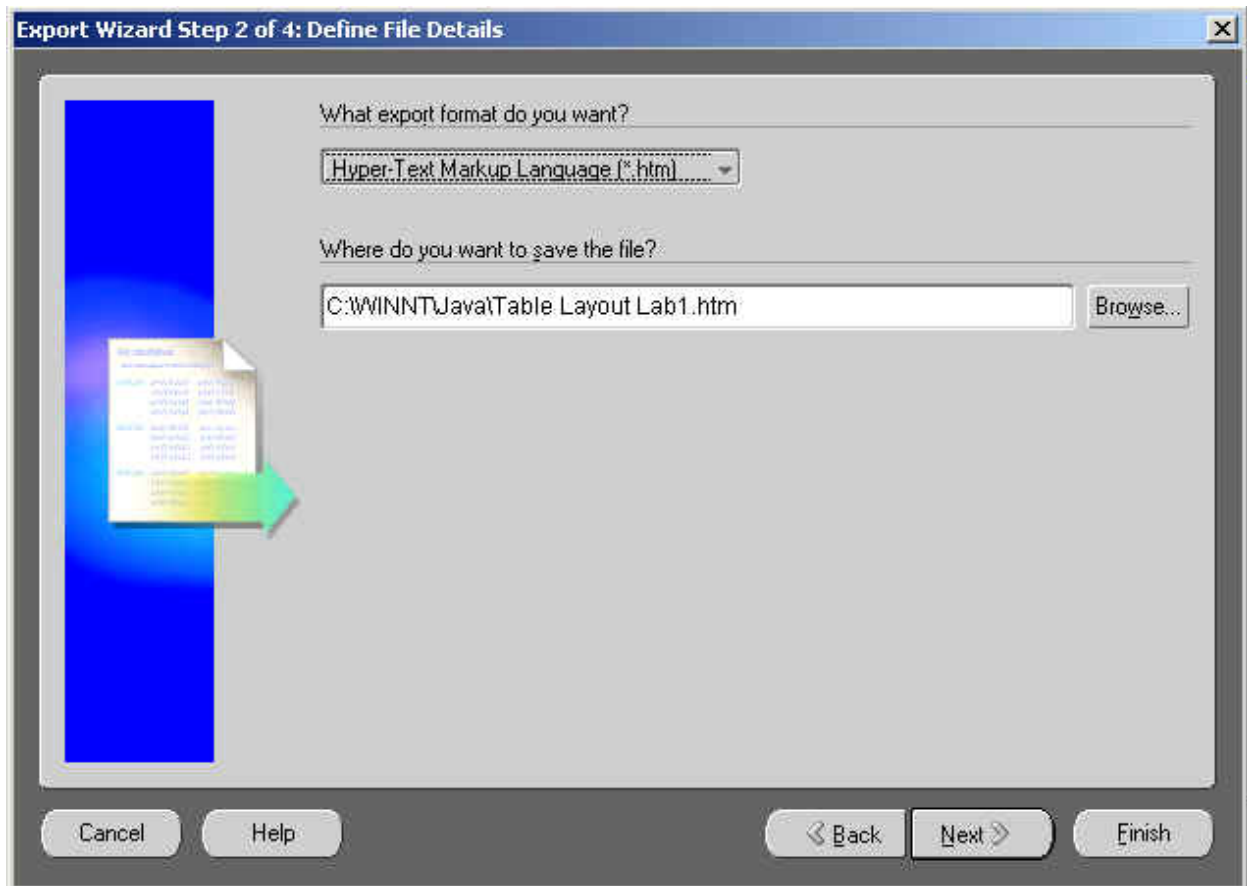
29. Select the HTM Format from the drop-down list of values under the Export Format. Select (B) Next to continue.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph

30. Accept the default value for current size under the Graph Size. Select (B) Next to continue.

Lab 1 Solutions: Creating and Exporting a Graph
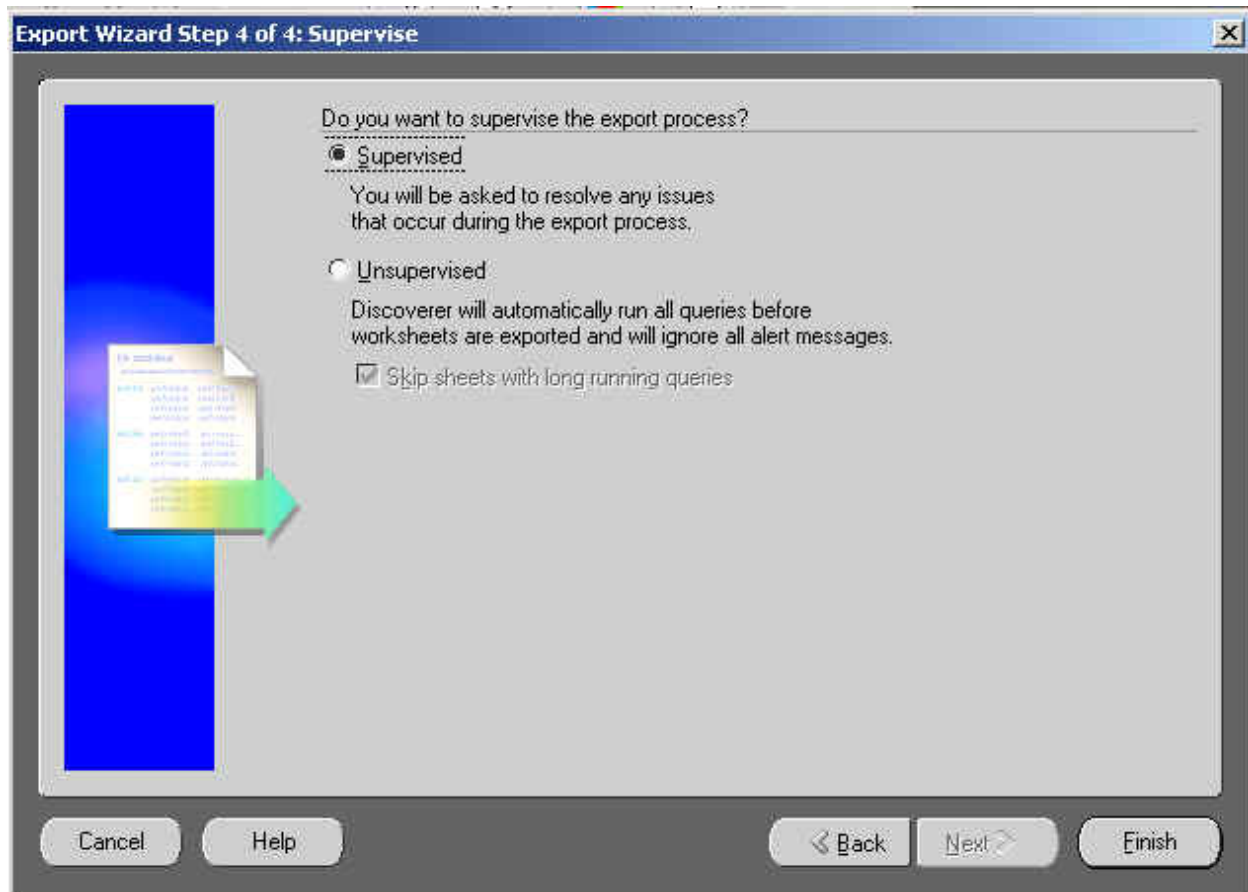
31. You will be asked if you want to have a supervised or unsupervised export. Select Supervised and select Finish to execute the export.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph
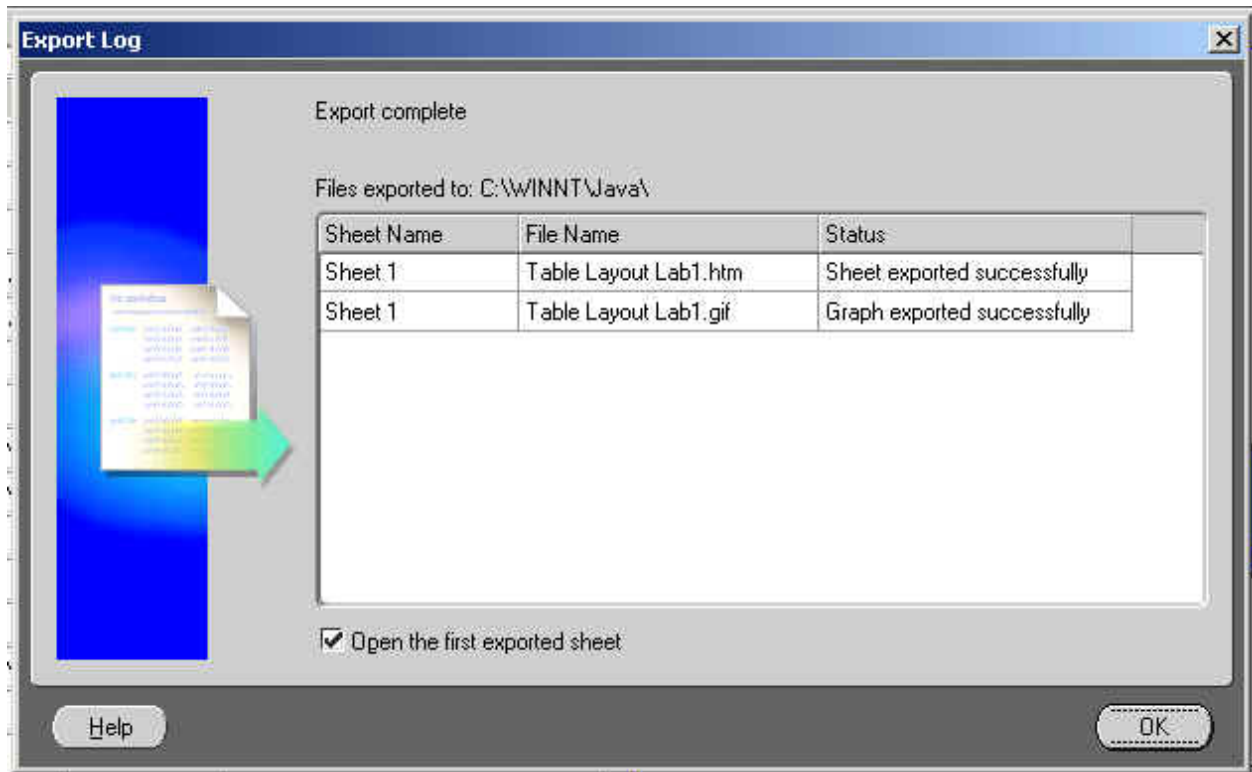
32. You will receive an Export Log dialog box that displays a successful or an error. Select (B) OK.

Lab 1 Solutions: Creating and Exporting a Graph
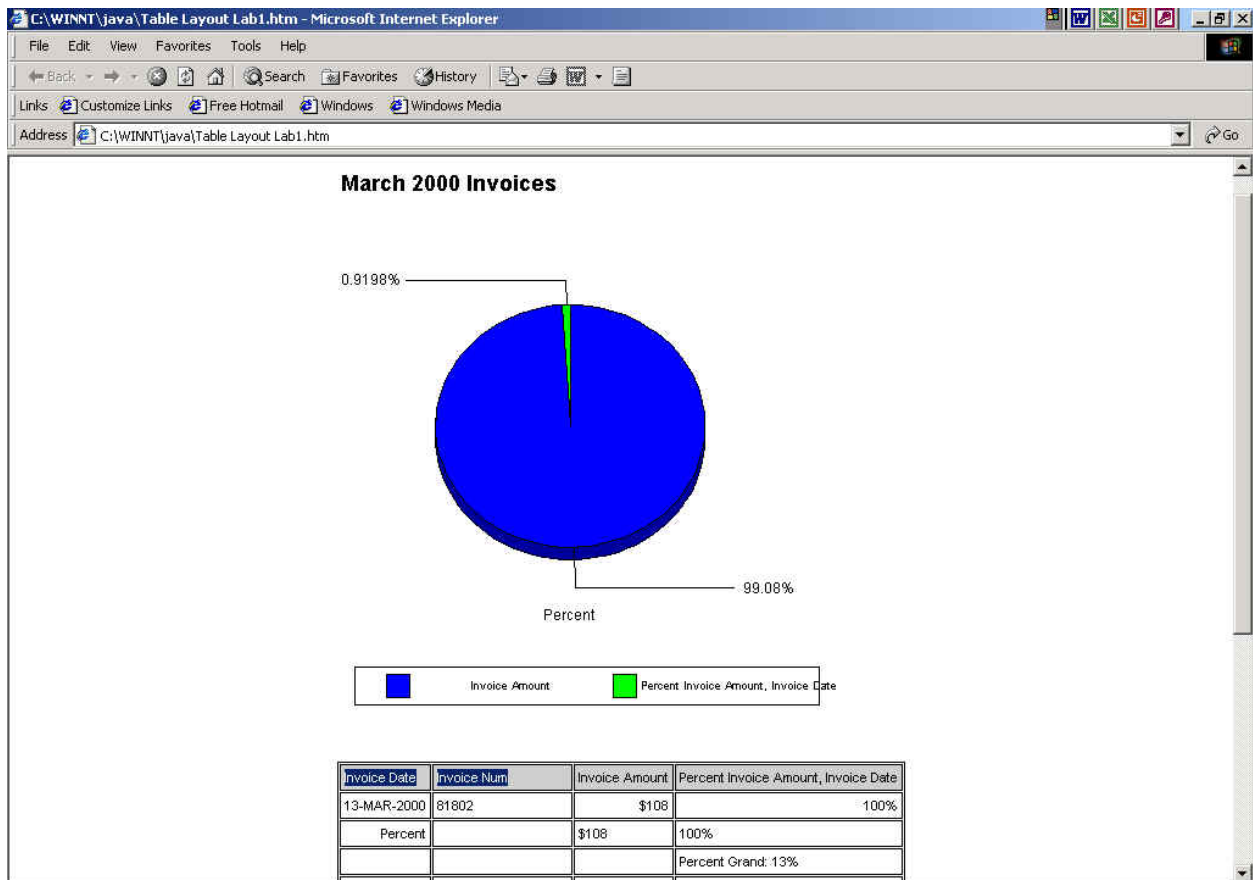
33. Once you have executed the export, your Internet Browser will be activated. You can open the browser and view your graph and worksheet.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph (corrections)

There are some corrections that need to be made to this lab. Make these corrections to the report.

1. Select or Highlight the Report. It should have a blue box around it.

2. Select the Edit Worksheet Icon from the Toolbar.
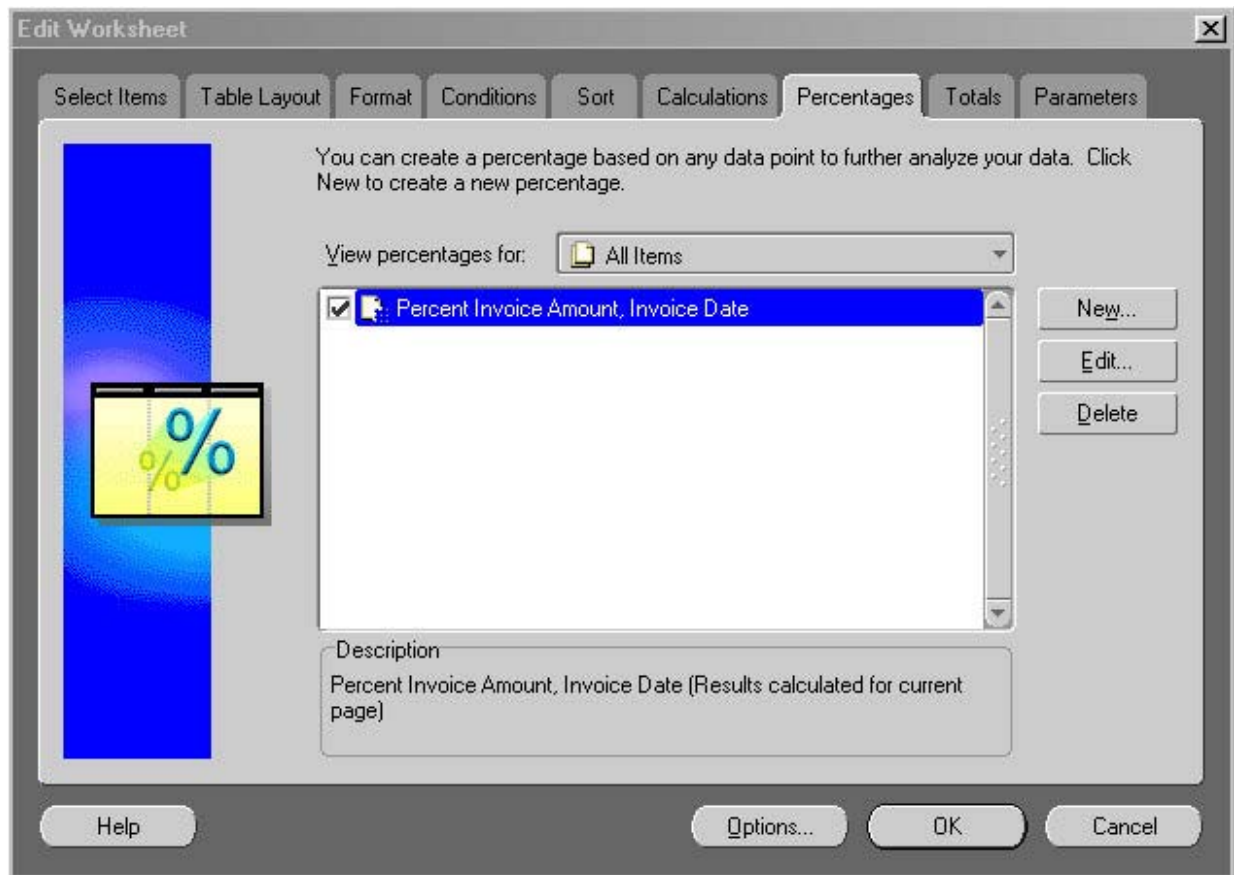
3. Select the Percentage tab. Select (B) Edit.

Lab 1 Solutions: Creating and Exporting a Graph (corrections)


4. Change the Calculate as a percentage of radio button from "Subtotal at each change in:" to "Grand Total of all Values".

5. Select (B) OK. Select (B) OK again. The report will requery the information.

Make these corrections to the graph.

6. Select or Highlight the Pie Chart. It should have a blue box around it

7. Select the Graph Wizard Icon from the Toolbar.

# Lab 1 Solutions: Creating and Exporting a Graph (corrections)
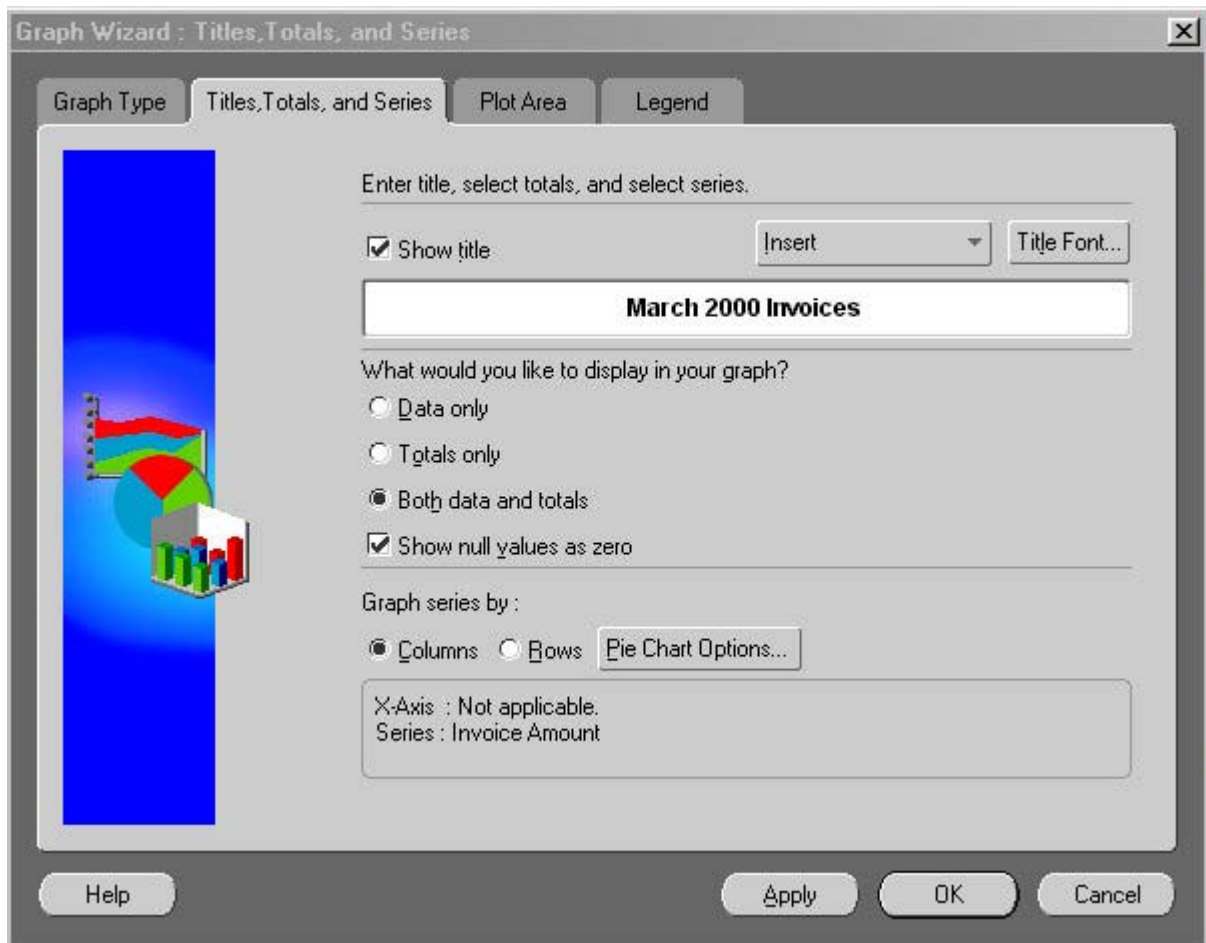
8. Select the Titles, Totals and Series tab.

9. Change the Graph Series by from "Rows" to "Columns".

10. Select (B) Pie Chart Options.

Using Discoverer 4i Web

Lab 1 Solutions: Creating and Exporting a Graph (corrections)
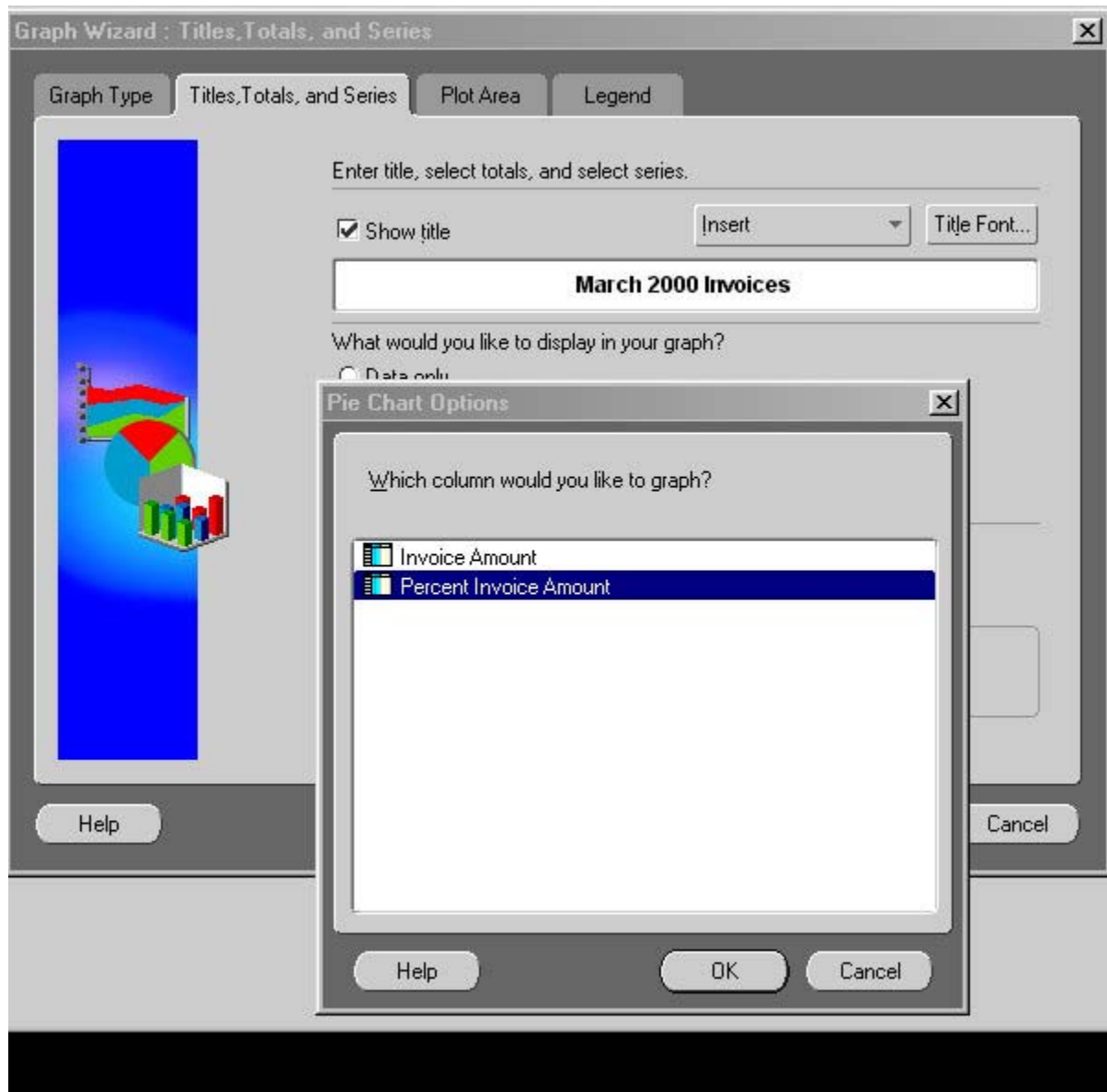
11. Select Percent Invoice Amount, Invoice Date from the list of values.

12. Select (B) OK. Select (B) OK again.

Lab 1 Solutions: Creating and Exporting a Graph (corrections)
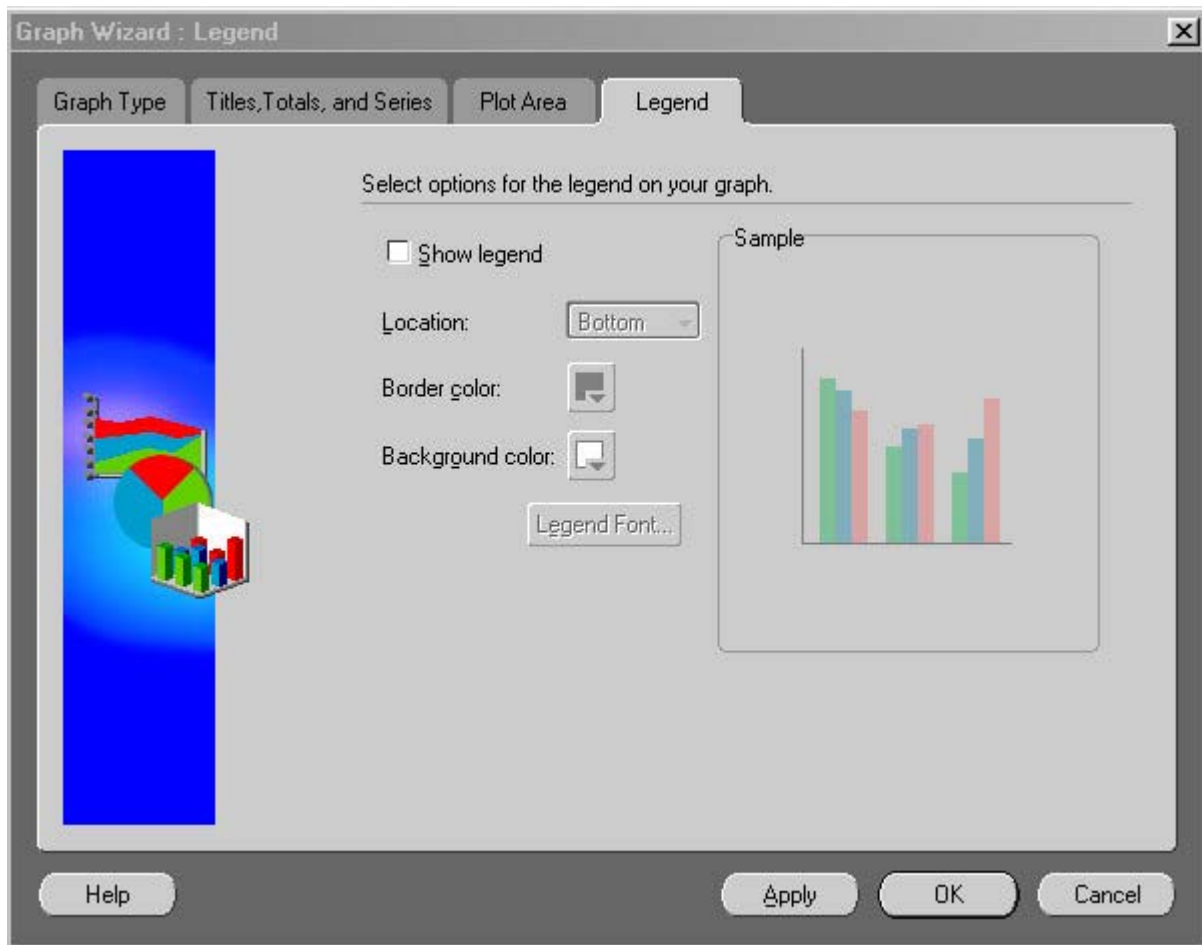
13. Select the Legend tab. Uncheck the Show Legend checkbox. Select (B) OK.

14. Display report and graph.

15. Export and graph again.

Using Discoverer 4i Web
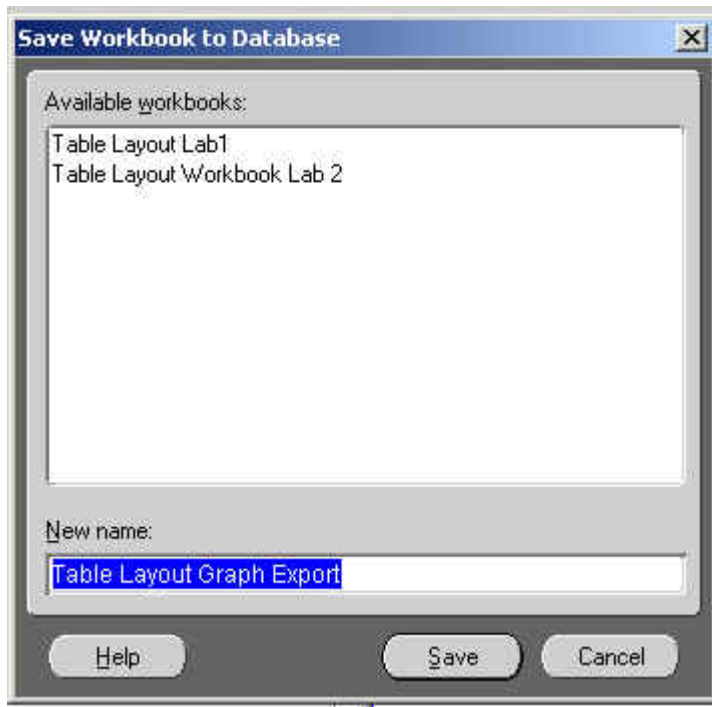
Lab 2: Saving a Graph Export

Instructions

You have completed your workbook and now need to save it to the database for retrieval later.

Save your workbook as XX Table Layout Graph Export. XX will be your monitor number that will be assigned by your instructor.

Exit workbook.

Lab 2 Solutions: Saving a Graph Export

1. Select (M) File, Save As from the Menu Bar. Name the workbook XX Table Layout Graph Export. The XX is your monitor number, which will be assigned to you by your instructor. Save (B) Save.
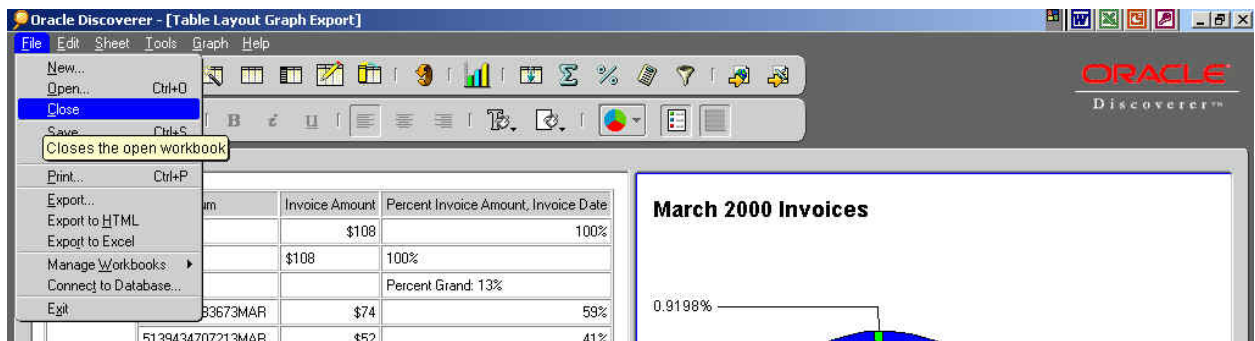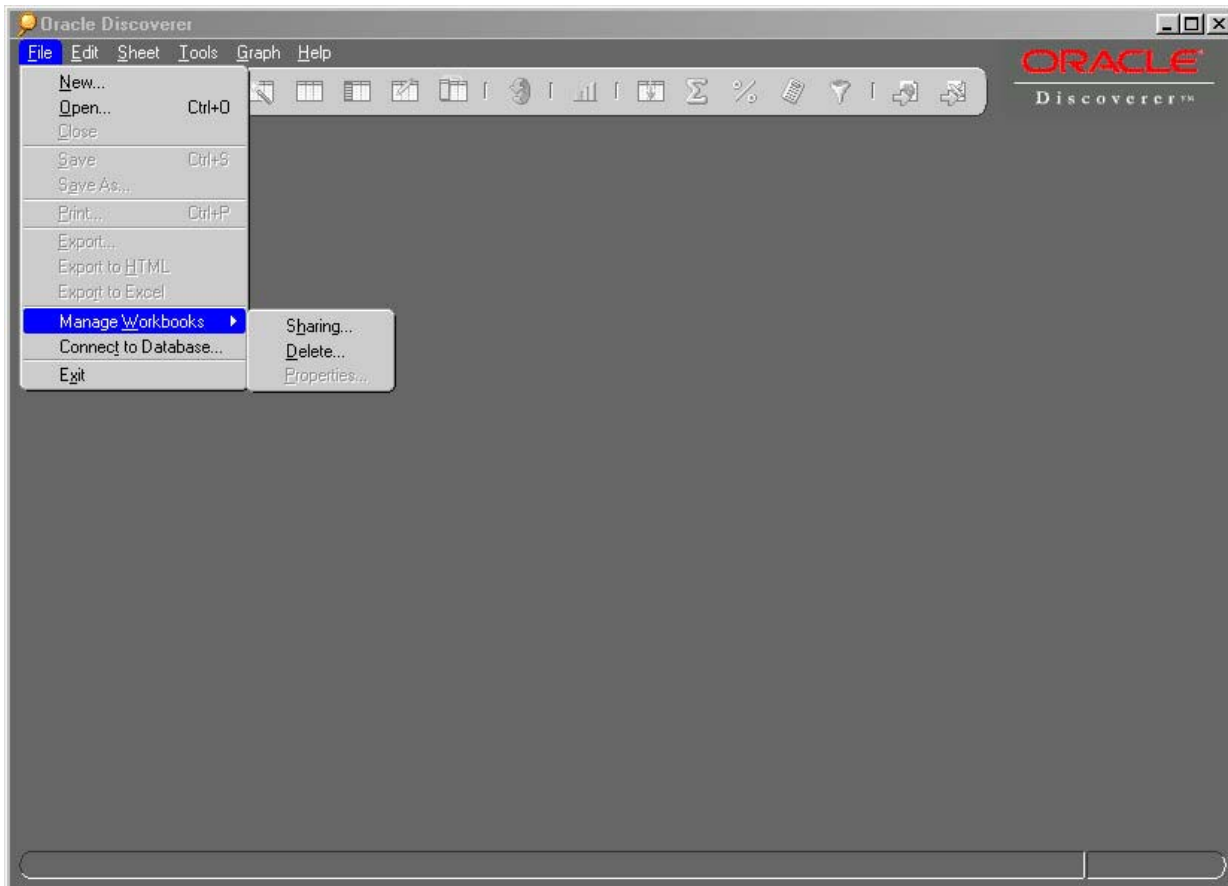

2. Close Discoverer. Select (M) File. Close from the Menu Bar.

Using Discoverer 4i Web

Sharing a Workbook to an User
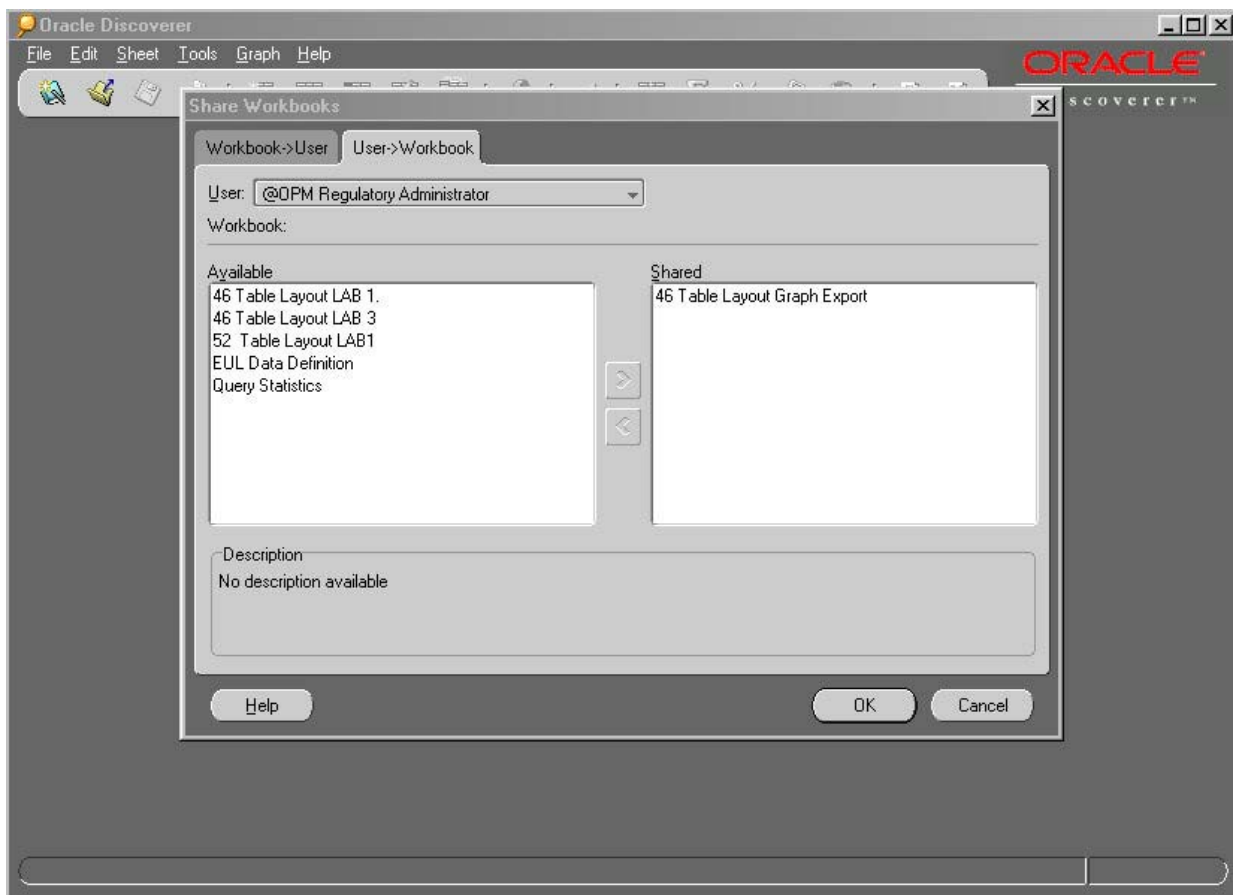
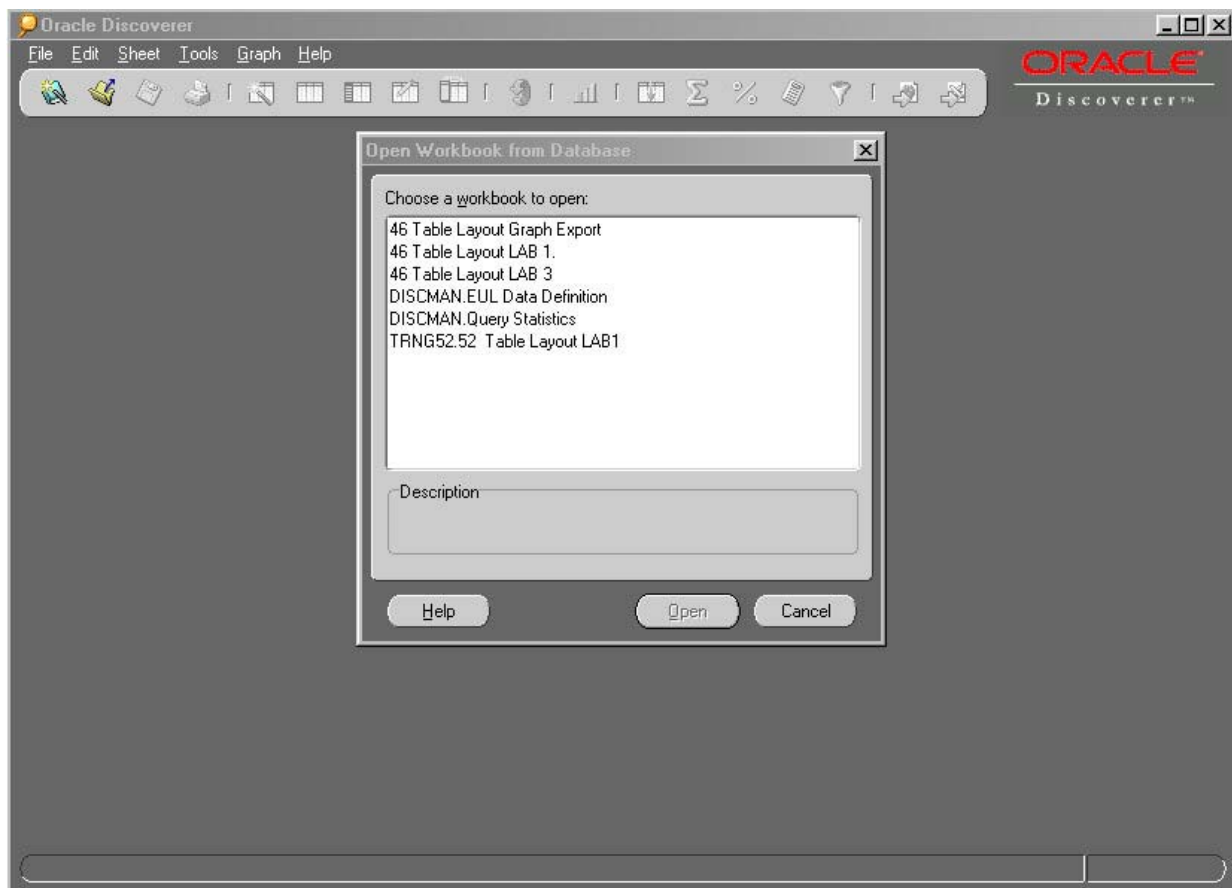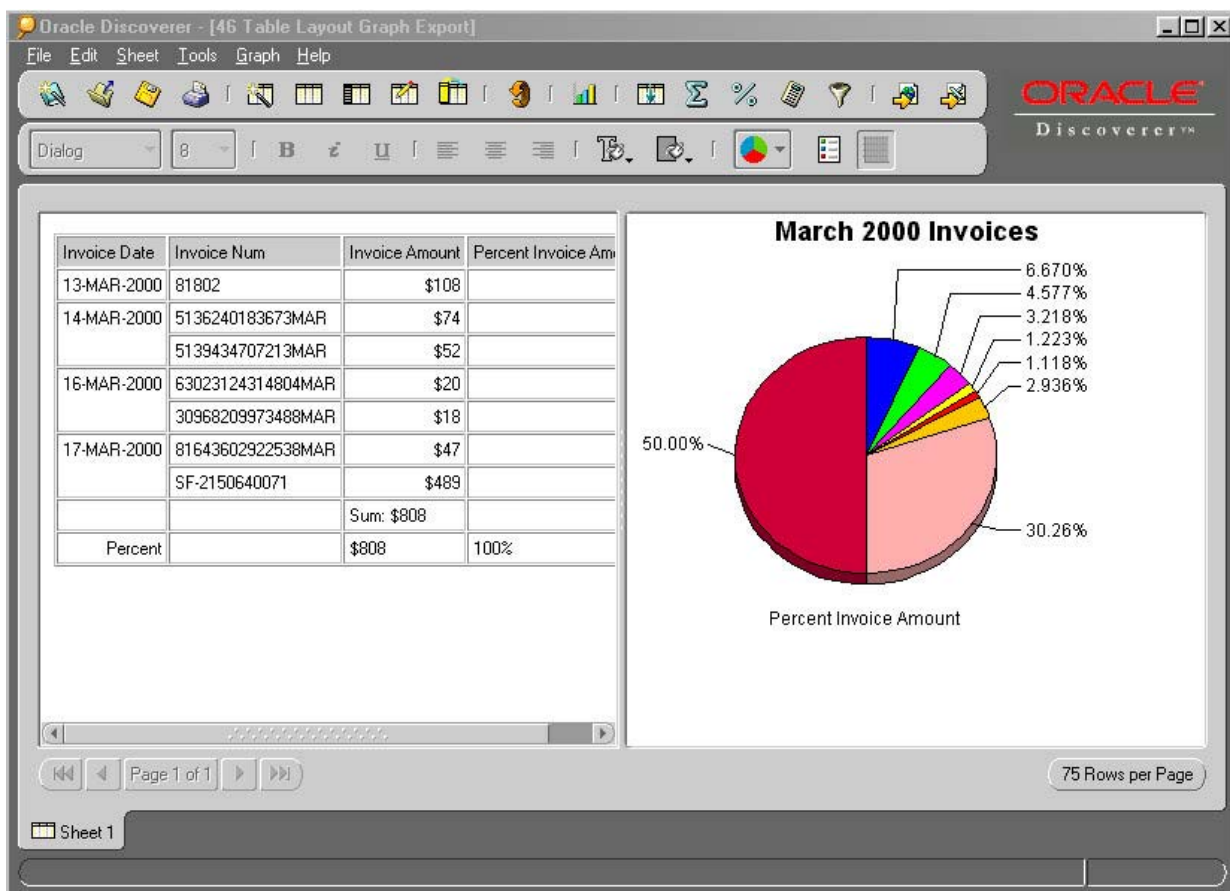| |
|---|
| Oracle Discoverer 4i Web |
| File → Manage Workbooks → Sharing |
| Oracle Discoverer |

1.   Select File: Manage Workbooks: Sharing from the Menu Bar.

2. Select the Workbook you would like to share from the Workbook dropdown menu.

3. Select from the Available list of Users or Responsibility on the left and paste to the shared box on the right.

4. Select (B) OK.

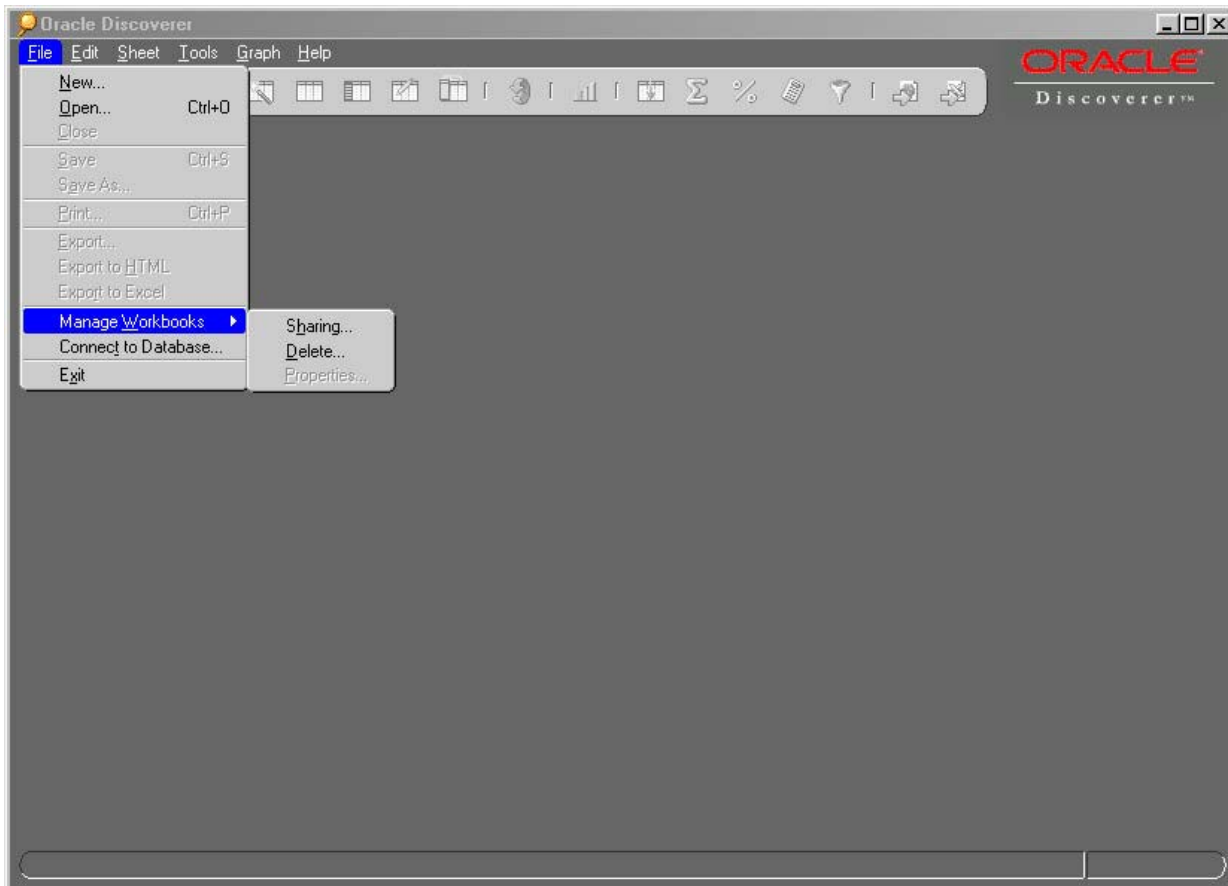The User that has received this workbook will have this in their list of available workbooks

The Workbook will contain the User ID of the one who has shared the report.
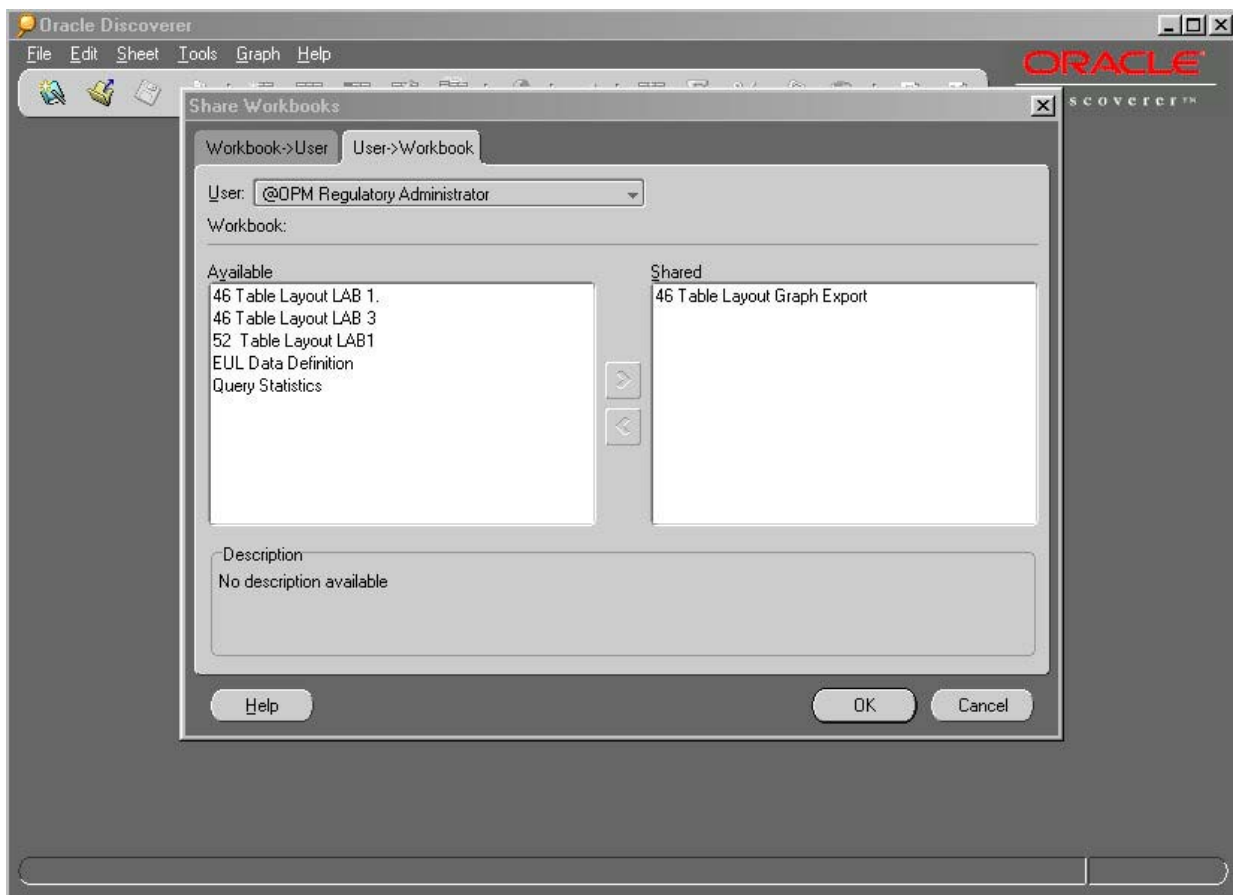
Users Sharing a Workbook

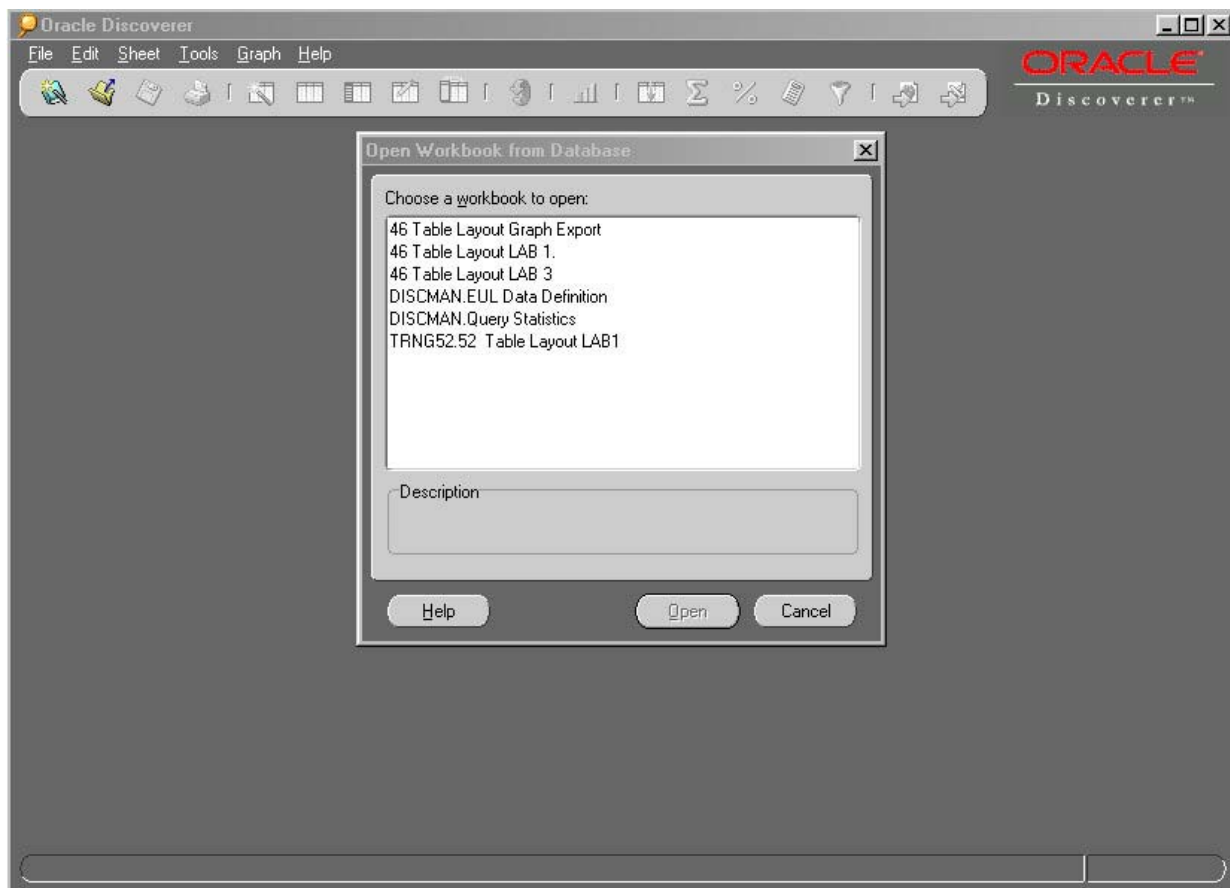| |
|---|
| Oracle Discoverer 4i Web |
| File → Manage Workbooks → Sharing |
| Oracle Discoverer |

1. Select File: Manage Workbooks: Sharing from the Menu Bar.

2. Select the User ID from the dropdown list of values under User.

3. Select from the Available list of Workbooks on the left and paste to the shared box on the right.

4. Select (B) OK.

The User that has received this workbook will have this in their list of available workbooks
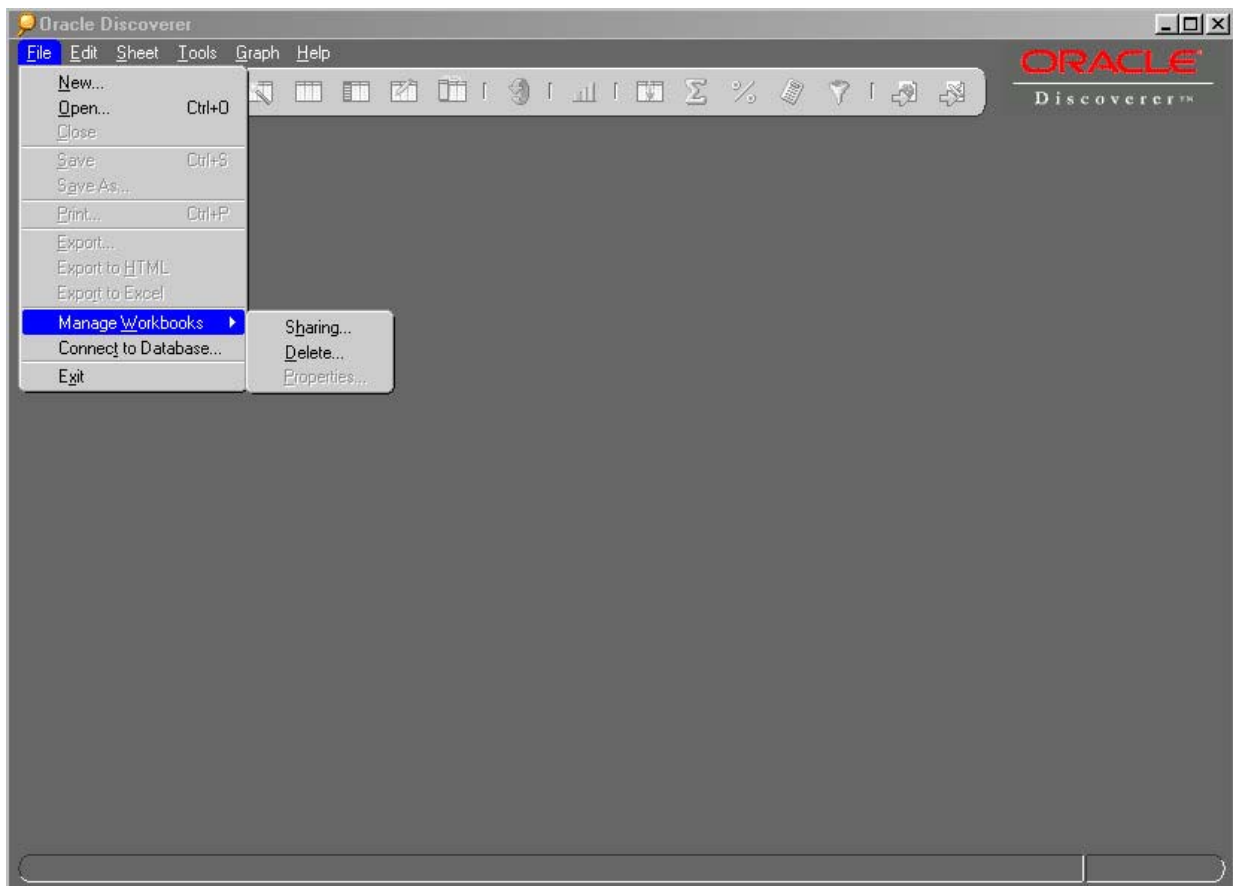
The Workbook will contain the User ID of the one who has shared the report.
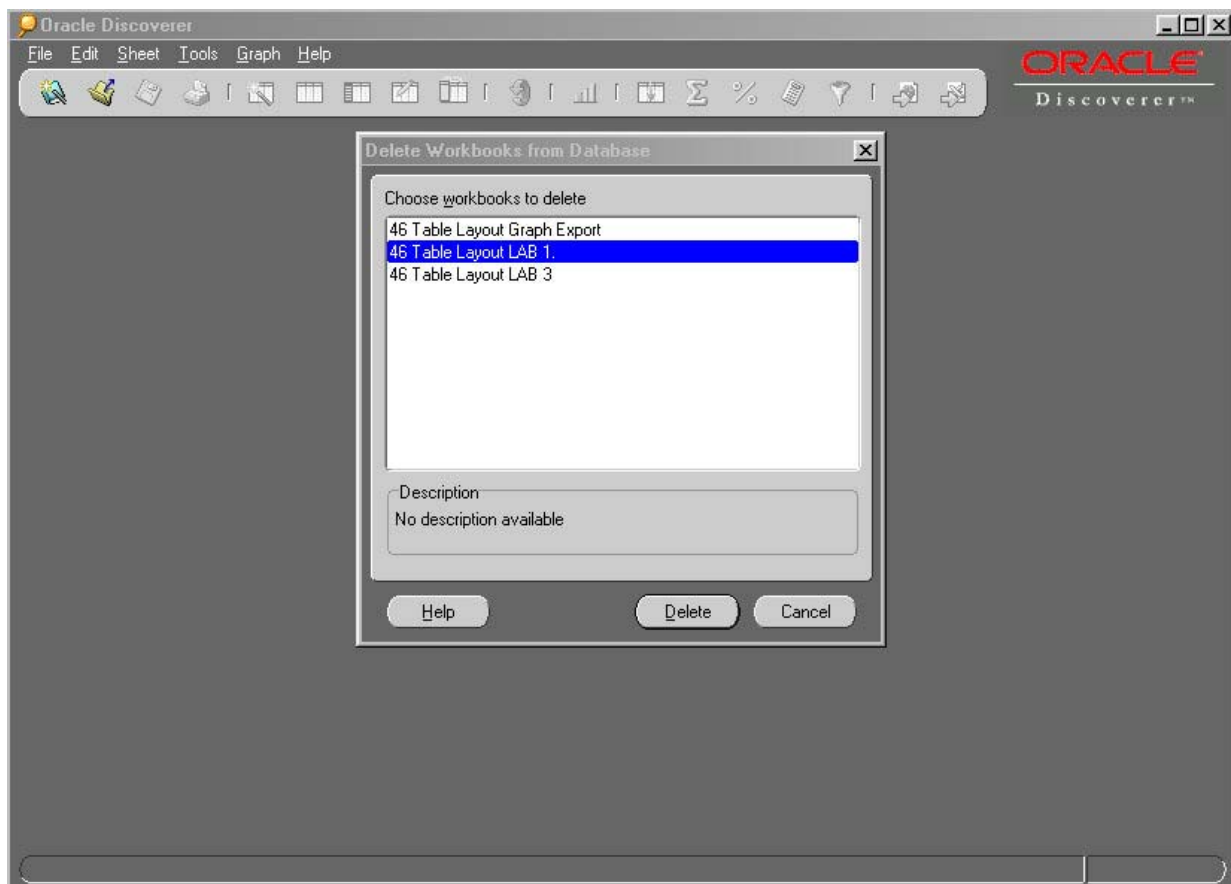
Deleting a Workbook from the Database

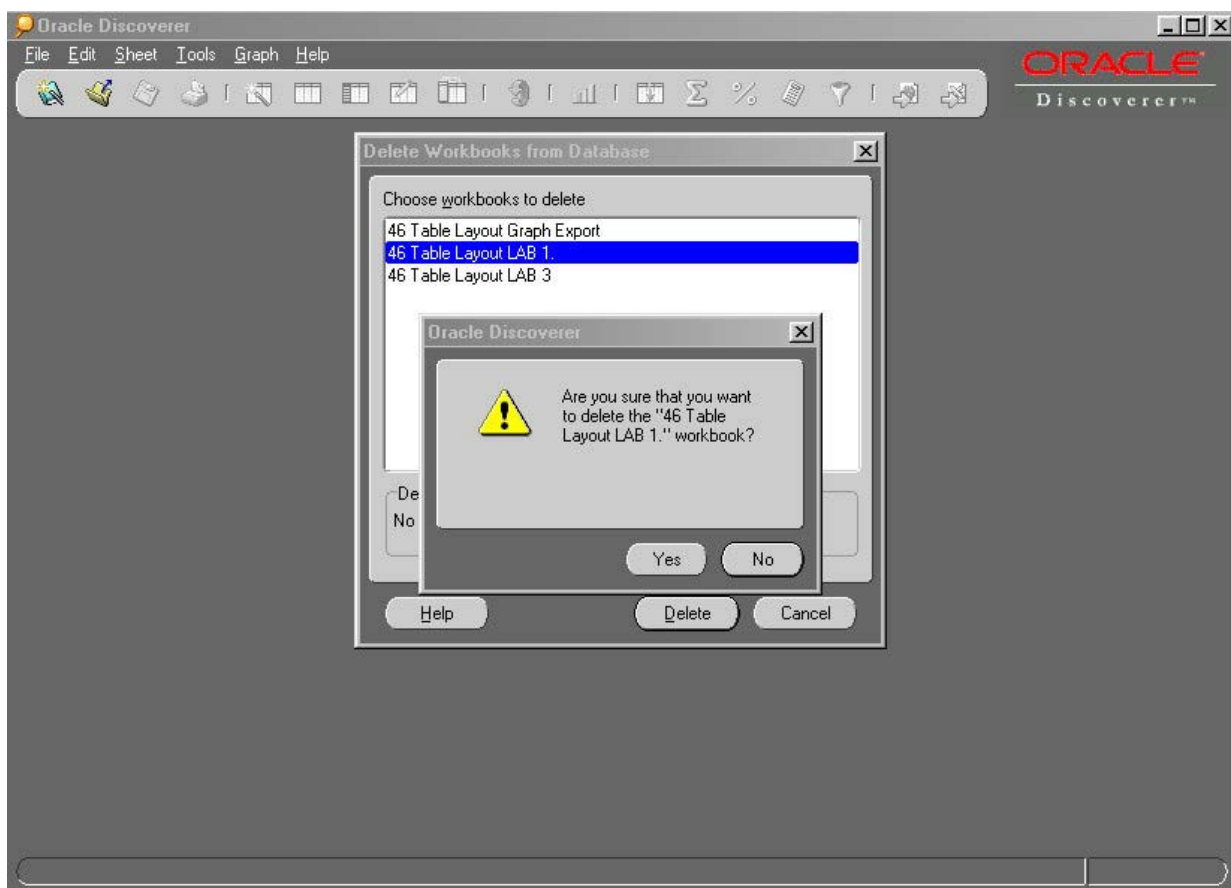Oracle Discoverer 4i Web

File → Manage Workbooks → Sharing

Oracle Discoverer

1. Select File: Manage Workbooks: Delete from the Menu Bar.

Using Discoverer 4i Web

2. Select the workbook that you would like to delete

3. Select (B) Delete.

4. You will be prompted to ensure that you really want to delete this workbook. Select (B) Yes. Once you select Yes you will return to the Discoverer main window.

Using Discoverer 4i Web